A5690-1.1-F

INTERNATIONAL AIRLINE PASSENGERS ASSOCIATION (IAPA)

Membership Survey Results - 1984/1985

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NORTH AMERICAN SURVEY RESULTS

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Published by
International Airline Passengers Association
(Group Publications) Ltd

DALLAS . LONDON . HONG KONG . PANAMA . ROTTERDAM
BERLIN . PORTUGAL

FOREWORD

This report presents a summary of the data analysis of the 1984 IAPA membership survey. In general, members are high frequency air travellers who make trips for both business and pleasure. They are predominantly male, highly educated, of a professional or business status, and in the middle to high income brackets.

Since the civil aviation industry in the North American continent is markedly different from that in other parts of the world, two questionnaires were compiled; the first was sent to members residing in North America, Canada and Mexico, the second to members in all other parts of the world. The results from the two questionnaires are presented in separate booklets.

Questionnaires were mailed to over 93,000 IAPA members. As of November 1984 10,059 of the North American questionnaires and 9,072 of the international questionnaires had been returned giving an overall response rate of 20%. Approximately 44% of IAPA membership resides in the Americas.

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ABOUT THE NORTH AMERICAN SURVEY RESPONDENTS

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This section of the report presents the basic demographic profile of the 1984 American respondents and their businesses. Where appropriate, comparisons with the previous 1981 and 1979 survey results are made. There were a total of 10,059 respondents to this year's American survey, 9,324 being U.S. residents, and 735 residing in other North American countries (primarily Canada or Mexico).

Throughout this report the 7.3% of respondents who reside outside of the U.S.A. are referred to as "Other N.A. Respondents".

RESPONDENT DEMOGRAPHICS

Country of residence

At the time the survey was conducted, 92.7% of the American respondents resided in the United States, 2.4% lived in Canada, 3.2 % resided in Mexico and 1.7% lived elsewhere.

U.S. Region/city of residence

U.S. respondents reside in the following U.S. regions:

East	25.8%	32.4%
South/South Central	20.9%	26.2%
North Central	15.7%	19.7%
West	17.3%	21.7%
No response	20.3%	-
	100.0%	100.0%

In addition, the following percentages of respondents live in the following U.S. cities, which are the home bases for the five major domestic airlines. .

Home city/airline	Respondents residing in city Percentage/Number
Atlanta/Delta	1.5% / 137
Chicago/United	3.8% / 355
Dallas/American	4.9% / 464
Miami/Eastern	2.0% / 195
St. Louis/TWA	1.0% / 75

Age

The average ages of 1984 U.S. and Other N.A. survey respondents are 53.6 and 48.1 years, respectively. This is somewhat older than the typical 1981 U.S. (50.2) and Other N.A. (44.8) respondents.

AGE

U.S. respondents

	1984		1981	1979
Under 20	0.1%	Under 18	0.1%	0.1%
20 - 24	0.5	18 - 21	0.2	0.3
25 - 29	1.9	22 - 25	1.7	1.6
30 - 34	4.8	26 - 35	13.8	11.3
35 - 39	7.7	36 - 45	22.1	19.9
40 - 44	9.7	46 - 55	26.2	28.8
45 - 49	10.7	56 - 65	23.4	25.3
50 - 54	14.3	OVER 65	12.6	12.7
55 - 59	14.8			
60 - 64	15.3			
65+	20.3			
Average	53.6	Average	50.2	51.1

Other N.A. respondents

	1984		1981	1979
Under 20	0.0%	Under 18	0.0%	0.0%
20 - 24	1.2	18 - 21	0.6	0.4
25 - 29	3.3	22 - 25	2.3	1.4
30 - 34	8.7	26 - 35	22.2	19.0
35 - 39	13.5	36 - 45	30.8	35.1
40 - 44	13.9	46 - 55	26.6	27.9
45 - 49	14.2	56 - 65	13.8	13.0
50 - 54	15.4	Over 65	3.8	3.1
55 - 59	15.1			
60 - 64	8.9			
65+	5.7			
Average	48.1	Average	44.8	not available

Sex

As has been the case in previous surveys, the vast majority of this year's American respondents are male.

SEX

	U.S. respondents			Other N.A. Respondents		
	1984	1981	1979	1984	1981	1979
Male	90.1	92.0	90.2	94.7	96.0	97.1
Female	9.9	8.0	9.8	5.3	4.0	2.9

Marital status

Slightly more than 80% of the 1984 survey respondents are married at the present time.

MARITAL STATUS 1984

	U.S. respondents	Other N.A. respondents
Married	80.3%	84.6%
Unmarried	19.7%	15.4%

Education

As in previous years, 1984 American respondents are well educated; almost all have at least some college background and about half have done postgraduate work.

EDUCATION

	U.S. respondents			Other N.A. respondents		
	1984	1981	1979	1984	1981	1979
1 - 6 years	0.3%	0.1	0.2	0.7%	0.4	0.3
7 - 9 years	0.6	0.5	0.7	0.7	0.9	2.2
10 - 12 years	7.5	6.9	8.8	8.3	8.7	12.4
1 - 2 years college	14.6	14.8	15.7	8.0	12.1	11.8
3 - 4 years college	31.6	31.2	28.9	22.4	28.8	27.3
Postgraduate work	45.3	46.5	45.8	59.8	49.2	46.1

Occupation

As in 1981 and 1979, most 1984 survey respondents work as executives, managers or professionals.

OCCUPATION

	U.S. respondents			Other N.A. respondents		
	1984	1981	1979	1984	1981	1979
Executive/manager	42.9	42.9	36.5	54.6	56.6	55.5
Professional	20.7	19.7	33.7	19.1	16.8	29.9
Teacher/professor	2.9	3.2	----	1.9	2.2	----
Sales (other than retail)	6.8	9.0	12.7	2.2	3.4	6.8
Technical	3.0	3.9	----	2.7	2.7	----
Craftsman	0.3	0.4	1.1	0.4	0.1	0.9
Clerical	0.6	0.5	0.7	0.1	0.5	0.4
Government/military	2.8	3.6	----	2.9	4.7	----
Retired	9.5	6.4	7.5	3.4	2.3	2.1
Self-employed	7.5	9.2	----	8.3	10.2	----
Student	0.2	0.4	----	1.0	0.4	----
Homemaker	0.9	0.5	----	0.5	0.2	----
Other	2.2	0.5	7.8	2.9	0.0	4.4

Income

The average annual household income for 1984 U.S. respondents is $82,400, as compared with $71,300 in 1981 and $54,100 in 1979. Other N.A. respondents report an average household income of $80,800, versus a similar amount, $82,300 in 1981.

ANNUAL HOUSEHOLD INCOME

U.S. Respondents

	1984		1981	1979
Under $20,000	3.1%	Under $20,000	3.6%	8.3%
20,000 - 34,999	9.1	20,000 - 35,000	13.7	23.9
35,000 - 49,999	17.0	35,001 - 50,000	25.0	26.0
50,000 - 64,999	21.1	50,001 - 75,000	26.0	21.4
65,000 - 79,999	13.1	75,001 - 100,000	14.8	8.9
80,000 - 99,999	11.3	100,001 - 150,000	8.8	11.6
100,000 - 149,999	13.8	Over 150,000	8.1	---
150,000 +	11.6			
Average	$82,400	Average	$71,300	$54,100
Percentage change since preceding survey	+ 15.5%	Percentage change since preceding survey	+ 31.0%	

Other N.A. respondents

	1984		1981	1979
Under $20,000	4.4%	Under $20,000	1.8%	
20,000 - 34,999	10.0	20,000 - 35,000	11.2	
35,000 - 49,999	15.7	35,001 - 50,000	20.5	
50,000 - 64,999	20.4	50,001 - 75,000	26.4	
65,000 - 79,999	13.2	75,001 - 100,000	15.7	
80,000 - 99,999	11.8	100,001 - 150,000	11.8	
100,000 - 149,999	13.7	Over 150,000	12.6	
150,000+	10.8			
Average	$80,800	Average	$82,300	not available.
Percentage change since preceding survey	- 2.7%			

The number of American respondent households with 2+ persons contributing to income has been steadily increasing over the past five years.

NUMBER OF FAMILY MEMBERS CONTRIBUTING TO HOUSEHOLD INCOME

	U.S. respondents			Other N.A. respondents		
	1984	1981	1979	1984	1981	1979
1 person	62.9%	69.5%	73.9%	64.8%	74.4%	77.5%
2 persons	36.2	29.6	25.3	30.2	23.1	19.6
3 persons	0.9	0.9	0.8	5.0	2.5	3.0

PROFILE OF RESPONDENTS' BUSINESSES

1984 American survey participants work in the following industries:

CATEGORY OF BUSINESS

	U.S. respondents	Other N.A. respondents
Manufacturing	20.1%	22.1%
Professions	17.9	10.9
Business services	7.1	5.6
Government	5.8	5.0
Wholesale trade	5.4	4.5
Communications	5.1	3.3
Other services	3.8	3.9
Finance	3.2	3.9
Transportation	3.0	2.8
Mining/oil/gas	2.9	5.8
Retail trade	2.9	2.3
Construction	2.7	7.8
Insurance	2.3	1.4
Real estate	2.1	2.3
Agriculture	1.9	4.2
Other	14.1	14.5

Size of respondents' firms

The number of American survey respondents employed in relatively small firms (under 100 employees) has increased somewhat since 1981, with over half currently reporting that their company falls in this category.

SIZE OF RESPONDENTS' FIRM

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
1 - 99	55.4%	50.3%	50.0%	44.5%
100 - 249	10.4	10.9	10.4	13.4
250 - 499	6.9	8.0	10.5	9.8
500 - 999	5.9	6.6	6.8	9.1
1,000 - 4,999	9.5	10.5	12.3	11.2
5,000+	12.0	13.8	10.1	12.0

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NORTH AMERICAN AIRLINE EXPERIENCES

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DOMESTIC AIRLINES FLOWN DURING PAST TWO YEARS

From a specified list of U.S. and international airlines, respondents indicated on which ones they had flown during the past two years. Among U.S. respondents, there has been a significant (at least 5%) decline in reported usage since 1981 on the following American carriers:

- American
- Delta
- United
- TWA
- U.S. Air
- Continental
- Western
- Frontier
- Air Cal

The results show American and Delta to have declined in terms of usage from their 1981 positions as the number 1 and number 2 carriers to the number 2 and number 3 carriers, respectively. Eastern is currently the domestic airline with the largest reported U.S. usage.

In all, this year's top five domestic carriers in terms of reported U.S. usage are:

- * Eastern (72.3%)
- * American (70.9%)
- * Delta (70.4%)
- * United (69.4%)
- * TWA (57.0%)

Only one domestic airline, New York Air (from among those evaluated in 1984 and 1981), shows a significant increase (at least 5%) in U.S. passenger usage since 1981.

Other N.A. respondents indicate significant decreases (at least 5%) in their use of the following U.S. airlines since 1981:

- * American
- * Delta
- * United
- * U.S. Air
- * Western

In current findings, the top five domestic carriers flown by Other N.A. residents are:

- Eastern (70.1%)
- American (65.4%)
- Pan Am (59.1%)
- United (44.2%)
- Delta (43.8%)

Both Pan Am and U.S. Air have been flown significantly (at least 5%) more frequently by Other N.A. respondents in 1984 findings than in 1981 findings. Listed below is a comparison of domestic airline usage by 1984 U.S. respondents' area of residence. (See table 1 for details on domestic airlines flown.)

DOMESTIC AIRLINES MOST COMMONLY FLOWN BY 1984 U.S. RESPONDENTS
IN THE PAST TWO YEARS BY AREA OF RESIDENCE.
(All airlines flown by at least 50% of the respondents)

East	South/ South Central	West	North Central
Eastern (83.9%)	Delta (86.4%)	United (82.4%)	United (81.1%)
American(74.2%)	Eastern (80.1%)	American (70.5%)	Delta (73.8%)
United (72.7%)	American (68.1%)	PSA (62.8%)	American (73.5%)
Delta (69.8%)	United (50.3%)	Western (61.2%)	TWA (66.3%)
TWA (68.3%)		TWA (58.8%)	Eastern (64.9%)
U.S. Air (62.2%)		Delta (54.3%)	Republic (60.6%)
Pan Am (51.1%)		Eastern (53.8%)	Northwest (58.1%)
		Republic (50.5%)	

Table 1

DOMESTIC AIRLINES FLOWN DURING THE PAST 2 YEARS

	U.S. respondents				Other N.A. respondents			
	1984	Rank	1981	Rank	1984	Rank	1979	Rank
Eastern	72.3%	1	77.0%	3	70.1%	1	74.5%	2
American	*70.9	2	82.2	1	*65.4	2	79.7	1
Delta	*70.4	3	77.4	2	*43.8	5	54.1	3
United	*69.4	4	74.7	4	*44.2	4	54.0	4
TWA	*57.0	5	64.0	5	31.6	--	32.9	--
Republic	44.0	--	44.5	--	27.1	--	29.1	--
Pan Am	44.0	--	42.8	--	(59.1)	3	49.9	5
U.S. Air	*41.7	--	48.3	--	*24.2	--	32.9	--
Northwest	38.5	--	40.6	--	20.8	--	23.4	--
Continental	*36.3	--	48.3	--	42.8	--	38.4	--
Piedmont	32.9	--	29.0	--	12.5	--	9.6	--
Western	*27.8	--	33.4	--	*38.5	--	48.3	--
PSA	25.8	--	28.0	--	14.7	--	18.6	--
Frontier	*24.3	--	30.2	--	12.5	--	16.8	--
Ozark	21.2	--	25.3	--	8.2	--	11.2	--
New York Air	(19.0)	--	8.9	--	(8.4)	--	1.8	--
Southwest	18.8	--	17.0	--	11.1	--	8.8	--
Air Cal	*15.6	--	21.7	--	8.7	--	11.1	--
Air Florida	15.1	--	19.0	--	10.9	--	13.1	--
People Express	15.1	--	--	--	6.2	--	--	--
Aloha	12.2	--	10.8	--	7.6	--	7.1	--
Hawaiian	10.3	--	8.7	--	5.3	--	4.9	--
Midway	8.7	--	6.7	--	0.7	--	0.7	--
Alaska	8.3	--	6.1	--	2.1	--	2.6	--
Muse Air	7.1	--	--	--	2.2	--	--	--
Capitol	5.5	--	--	--	3.6	--	--	--
World	4.2	--	--	--	1.8	--	--	--
America West	3.5	--	--	--	1.2	--	--	--
Mid Pacific	2.8	--	--	--	2.1	--	--	--
Air 1	2.6	--	--	--	0.6	--	--	--
Regent Air	0.6	--	--	--	0.8	--	--	--
Other	12.4	--	--	--	6.9	--	--	--

(   ) = At least 5.0% increase in reported usage since 1981.

* = At least 5.0% decrease in reported usage since 1981.

IN-FLIGHT SERVICE
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1984 American survey respondents' opinions as to which airlines provide the best and worst in-flight service may vary according to their country, area or city of residence. American Airlines is consistently rated as one of the best for in-flight service, while Eastern is more consistently named as having the poorest in-flight service as compared with other domestic carriers.

Of the five largest domestic carriers, all receive relatively frequent mentions as providing the best in-flight service in their home city.

DOMESTIC AIRLINES WITH THE BEST IN-FLIGHT SERVICE

(Includes airlines with at least 5.0% U.S. total mentions)

	Area of residence					
	Total	East	South/ South Central	North Central	West	Canada/ Mexico
American[1]	(48.1%)	(54.3%)	(43.8%)	(46.3%)	(47.8%)	(54.4%)
Delta[2]	(44.2)	(39.4)	(67.1)	(42.8)	(28.5)	(25.0)
United[3]	(37.6)	(44.5)	19.7	(44.2)	(46.2)	(22.9)
TWA[4]	(22.3)	(30.1)	11.0	(26.1)	(24.5)	10.5
Eastern[5]	16.2	18.5	(22.5)	11.7	8.6	(26.7)
Pan Am	9.9	11.8	12.2	4.4	9.9	(21.6)
Northwest	7.9	7.2	6.0	15.2	4.9	7.8
Continental	6.9	3.9	9.0	6.7	10.1	12.0
Republic	5.9	3.1	5.0	12.7	5.7	4.9
Piedmont	5.7	6.0	8.0	7.5	1.4	2.4

( ) = 20% and greater.

1. American 61.4% in Dallas
2. Delta 87.2% in Atlanta
3. United 54.8% in Chicago
4. TWA 68.3% in St. Louis
5. Eastern 35.8% in Miami

DOMESTIC AIRLINES WITH THE WORST IN-FLIGHT SERVICE

(Includes airlines with at least 5.0% U.S. total mentions)

		Area of residence				
	Total	East	South/ South Central	North Central	West	Canada Mexico
Eastern	(34.2%)	(41.8%)	(38.3%)	(28.6%)	(22.8%)	(26.8%)
U.S. Air	(17.8)	(28.5)	(12.2)	(22.3)	6.7	(11.7)
Pan Am	(14.0)	(15.5)	(15.1)	7.6	(16.0)	(31.2)
Republic	(13.8)	6.5	(16.0)	(18.8)	(19.5)	7.5
TWA	(10.3)	(11.2)	7.0	(13.9)	(11.2)	6.3
Northwest	(10.2)	(10.2)	5.8	(16.7)	(10.4)	4.4
United	(10.0)	6.6	6.2	(13.6)	(17.4)	5.6
People Express	7.1	(16.2)	4.8	3.1	1.3	2.3
Continental	7.0	4.1	8.8	5.3	(11.3)	(14.5)
American	6.9	6.2	9.2	6.3	5.4	6.8
Piedmont	6.3	8.5	8.5	6.3	1.7	1.9
Delta	5.7	4.1	6.8	7.3	5.0	3.3
Ozark	5.3	2.6	6.2	(13.2)	2.9	3.0
Western	5.0	1.9	2.5	3.7	(12.9)	6.5
PSA	-	-	-	-	(12.7)	-

( ) = 10% and greater

GROUND SERVICE

All American respondents agree that American Airlines is the U.S. carrier with the best ground service. Other N.A. residents feel that Delta almost equals American in this respect. Again, the major U.S. carriers score notably better than average in their home cities.

Eastern is widely regarded as the domestic airline with the worst ground service. Other N.A. residents cite Pan Am as being poorer than Eastern for the ground service it offers.

DOMESTIC AIRLINES WITH THE BEST GROUND SERVICE
(Includes all airlines with at least 5% total mentions)

		Area of residence				
	Total	East	South/ South Central	North Central	West	Canada/ Mexico
American[1]	(40.2%)	(45.1%)	(35.5%)	(38.8%)	(40.7%)	(52.9%)
Delta[2]	(38.2)	(31.7)	(61.6)	(35.5)	(22.7)	19.4
United[3]	(29.0)	(37.6)	13.1	(35.7)	(40.3)	15.2
TWA[4]	17.4	(23.3)	8.5	(21.0)	18.8	8.7
Eastern[5]	14.1	16.3	19.9	9.7	7.5	(23.9)
Pan Am	7.2	9.4	8.2	2.3	7.4	15.8

1 American 55.7% in Dallas   (   ) = 20% and greater
2 Delta 83.6% in Atlanta
3 United 46.6% in Chicago
4 TWA 45.8% in St. Louis
5 Eastern 35.7% in Miami

DOMESTIC AIRLINES WITH THE WORST GROUND SERVICE

(Includes all airlines with at least 5.0% total U.S. mentions)

		Area of residence				
	Total	East	South South Central	North Central	West	Canada/ Mexico
Eastern	(28.7%)	(34.6%)	(35.1%)	(20.2%)	(16.2%)	(23.0%)
U.S. Air	(14.7)	(23.9)	9.3	(17.4)	5.0	7.3
Pan Am	(12.7)	(15.1)	(13.5)	5.8	(14.1)	(31.5)
Republic	(12.4)	6.8	(13.6)	(17.3)	(16.8)	7.9
United	(10.8)	7.1	6.5	(14.9)	(17.8)	3.9
TWA	(10.8)	(11.8)	7.0	(14.5)	(11.5)	8.1
Northwest	9.0	8.9	4.9	(17.4)	7.2	5.3
American	7.4	4.6	(10.9)	6.7	7.0	4.5
Continental	6.7	3.8	8.3	5.1	(11.7)	(12.4)
People Express	6.6	(14.6)	7.8	2.9	1.2	2.2
Piedmont	5.5	7.9	7.3	4.2	1.6	2.0
Southwest	-	-	(10.7)	-	-	-
Ozark	-	-	-	(12.8)	-	-
Western	-	-	-	-	1.4	-

(   ) = 10% and greater

MOST PREFERRED U.S. AIRLINES
****

Respondents were asked to name up to four U.S. carriers on which they most prefer to fly. In the U.S., three U.S. airlines are most preferred - American, Delta and United. Among Other N.A. residents, American Airlines stands out alone as the first choice.

MOST PREFERRED DOMESTIC AIRLINES

(Up to 4 choices)
(Includes airlines with at least 5.0% U.S. total mentions)

		Area of residence				
	Total	East	South Central	North Central	West	Mexico
American[1]	(49.4%)	(55.8%)	(44.5%)	(47.2%)	(50.5%)	(56.6%)
Delta[2]	(43.2)	(39.2)	(66.8)	(41.6)	(27.8)	(26.7)
United[3]	(41.7)	(49.6)	(23.3)	(48.9)	(50.0)	(24.2)
TWA[4]	(24.5)	(33.5)	11.8	(29.0)	(26.3)	11.8
Eastern[5]	16.7	19.4	(24.0)	12.2	7.8	(27.8)
Pan Am	10.3	12.0	12.2	3.8	11.6	(22.6)
Northwest	7.4	6.3	5.8	14.2	4.6	7.9
Continental	6.1	3.3	8.6	5.4	9.0	9.0

(   ) = 20% and greater

[1] American 61.2% in Dallas
[2] Delta 85.5% in Atlanta
[3] United 58.6% in Chicago
[4] TWA 72.3% in St. Louis
[5] Eastern 39.1% in Miami
[6] Western Airlines 13.5%
[7] Western Airlines 15.9%

Respondents were also asked to designate one U.S. carrier as their most preferred. As in 1981 and 1979, American is the top choice in the U.S. with Delta and United being close second and third choices. Delta has been gaining in U.S. popularity since 1979, while Continental has lost ground during this same time.

SINGLE MOST PREFERRED DOMESTIC AIRLINE
(Top ten)

U.S. respondents				Other N.A. respondents			
	1984	1981	1979		1984	1981	1979
American[1]	24.9%	31.3%	23.9%	American	31.8%	37.8%	23.6%
Delta[2]	20.6	18.0	13.1	Pan Am	12.0	3.0	5.2
United[3]	19.8	18.7	22.2	Eastern	11.8	8.7	14.0
TWA[4]	9.5	9.2	11.1	Delta	9.8	12.6	13.2
Eastern[5]	5.8	4.3	3.8	United	8.4	11.4	15.2
Pan Am	4.6	1.3	1.4	Western	5.2	5.0	2.5
Northwest	2.2	1.3	0.9	TWA	4.2	4.1	7.8
Continental	1.5	6.1	9.9	Continental	3.4	5.3	5.0
Piedmont	1.4	---	---	Northwest	2.8	---	---
Republic	1.1	---	---	Republic	1.2	---	---

[1] American 43.3% in Dallas
[2] Delta 68.0% in Atlanta
[3] United 36.5% in Chicago
[4] TWA 60.3% in St. Louis
[5] Eastern 24.5% in Miami

By U.S. region, the choices for most preferred airline are as follows:

SINGLE MOST PREFERRED U.S. AIRLINE
(With 10% or more mentions)

		U.S. Area of residence			
	Total	East	South/ South Central[1]	North Central[2]	West
American	24.9%	29.5%	21.4%	20.2%	25.7%
Delta	20.6	13.9	41.0	16.7	9.6
United	19.8	23.4	4.8	25.4	28.7
TWA	9.5	12.4	2.9	13.3	11.5

1 Eastern - 10.1%
2 Northwest - 16.1%

DOMESTIC AIRLINES THAT WOULD BE AVOIDED

As in 1981 and 1979, Eastern is the airline that U.S. respondents single out as the one they would be most likely to avoid. Other N.A. respondents would be most likely to avoid both Pan Am and Eastern.

DOMESTIC AIRLINES TO BE AVOIDED
(Top ten)

U.S. respondents				Other N.A. respondents			
	1984[1]	1981[2]	1979[2]		1984[1]	1981[2]	1979[2]
Eastern	27.8%	18.9%	21.4%	Pan Am	21.9%	14.5%	14.8%
U.S. Air	16.4	11.2	12.0	Eastern	21.6	13.1	16.7
Continental	14.4	----	----	Continental	14.0	----	----
Republic	13.6	5.5	6.7	U.S. Air	10.3	10.4	11.0
Pan Am	12.4	8.6	6.2	Texas Int'l	10.1	8.1	3.1
People Express	11.1	---	---	Republic	9.8	4.7	4.8
Northwest	9.2	5.1	7.0	Air Florida	7.4	---	---
TWA	8.0	4.7	4.5	TWA	6.1	---	----
Piedmont	7.9	---	---	People Express	5.9	---	---
Ozark	7.3	---	---	American	5.4	3.8	7.1

[1] Multiple responses
[2] One response only

By U.S. area of residence, we find the following:

DOMESTIC AIRLINES TO BE AVOIDED
(Top ten)

	U.S. AREA OF RESIDENCE				
	Total	East	South/ South Central[1]	North Central	West[2]
Eastern	(27.8%)	(32.5%)	(31.4%)	(26.0%)	(18.3%)
U.S. Air	(16.4)	(26.0)	(11.0)	(21.3)	6.9
Continental	(14.4)	(10.7)	(14.4)	(15.0)	(20.8)
Republic	(13.6)	8.9	(14.4)	(16.5)	(19.3)
Pan Am	(12.4)	(12.7)	(12.4)	7.8	(15.3)
People Express	(11.1)	(20.5)	9.5	6.6	5.0
Northwest	9.2	8.7	5.4	(12.7)	(10.8)
TWA	8.0	8.2	7.9	9.5	8.2
Piedmont	7.9	8.8	9.2	9.3	5.1
Ozark	7.3	5.2	7.7	(13.0)	6.4

( ) = 10% and greater

[1] Air Florida 10.1%
[2] United 11.3%

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INTERNATIONAL AIRLINE EXPERIENCES

****

INTERNATIONAL AIRLINES FLOWN DURING PAST TWO YEARS

U.S. respondents' reported usage of international carriers has remained highly consistent since 1981. Only one airline - Air Canada - shows a significant (at least 5%) decline in usage and no carrier has had a major increase in usage during this time. The five international airlines flown most often among U.S. respondents are as follows:

- British Airways (38.7%)
- Air Canada (27.3%)
- Lufthansa (25.2%)
- Air France (21.2%)
- KLM (19.0%)

Other N.A. respondents report a significant (at least 5%) decrease in their usage of the following international carriers since 1981.

- British Airways
- Air Canada
- Air France
- Canadian Pacific

No international airline shows significantly increased usage by other N.A. respondents since 1981.

Due to the decline in Air Canada's passenger use, it has fallen from a first place rank in 1981 to third place this year among other N.A. respondents.

In all, the following are the five most commonly flown international carriers among this year's other N.A. survey participants:

* Mexicana (47.1%)
* Aeromexico (44.6%)
* Air Canada (41.4%)
* British Airways (40.3%)
* Air France (35.4%)

The international airlines most frequently flown by 1984 respondents are shown in table 2.

Table 2

INTERNATIONAL AIRLINES FLOWN DURING THE PAST 2 YEARS

	U.S. respondents				Other N.A. respondents			
	1984	Rank	1981	Rank	1984	Rank	1979	Rank
British Airways	38.7%	1	39.8%	1	*40.3%	4	46.0%	4
Air Canada	*27.3	2	33.7	2	*41.4	3	52.1	1
Lufthansa	25.2	3	24.8	3	33.0	--	32.8	--
Air France	21.2	4	23.9	4	*35.4	5	40.8	--
KLM	19.0	5	19.5	--	29.4	--	32.8	--
Swissair	18.7	--	19.7	5	25.1	--	22.7	--
JAL	14.5	--	14.8	--	17.0	--	17.8	--
Alitalia	13.4	--	14.1	--	18.8	--	18.7	--
Aeromexico	12.8	--	15.7	--	44.6	2	47.1	2
Mexicana	12.7	--	13.9	--	47.1	1	46.3	3
SAS	12.4	--	12.8	--	12.4	_	13.7	--
Singapore Airlines	12.0	--	9.7	--	11.8	--	9.6	--
British Caledonian	10.7	--	8.7	--	12.0	--	9.3	--
Cathay Pacific	9.8	--	8.0	--	10.6	--	9.1	--
China Airlines	8.4	--	7.3	--	5.6	--	5.6	--
Iberia	8.3	--	8.2	--	23.4	--	21.5	--
Canadian Pacific	7.1	--	8.7	--	*30.4	--	41.1	5
Qantas	6.9	--	6.5	--	5.8	--	6.1	--
Sabena	6.7	--	6.1	--	6.8	--	8.2	--
Varig	6.5	--	7.2	--	14.5	--	11.7	--
Thai Airways Int'l	6.0	--	4.7	--	7.2	--	6.0	--
Air New Zealand	5.8	--	5.3	--	3.8	--	4.3	--
BWIA Int'l	5.3	--	5.2	--	6.0	--	6.2	--

* = At least 5% decrease since 1981.

	U.S. respondents				Other N.A. respondents			
	1984	Rank	1981	Rank	1984	Rank	1979	Rank
Aer Lingus	5.3%	--	4.8%	--	3.2%	--	2.3%	--
Air Jamaica	5.2	--	4.8	--	4.2	--	3.9	--
El Al Israel Airlines	5.1	--	5.9	--	4.9	--	5.3	--
Avianca	4.9	--	6.0	--	11.3	--	10.0	--
Olympic Airways	4.8	--	4.6	--	8.2	--	6.4	--
Philippine Airlines	4.8	--	4.9	--	5.0	--	5.0	--
Air India	4.1	--	3.8	--	5.8	--	4.0	--
South African Airways	3.8	--	3.1	--	2.5	--	2.7	--
Egyptair	3.5	--	3.4	--	4.0	--	3.1	--
Ansett Airlines	3.3	--	3.6	--	3.1	--	2.4	--
Finnair	3.2	--	3.1	--	2.6	--	4.0	--
Aerolineas Argentinas	3.1	--	4.0	--	10.3	--	8.7	--
Viasa	3.0	--	4.6	--	8.4	--	9.0	--
Saudi Arabian Airlines	2.9	--	2.8	--	4.2	--	3.8	--
TAP	2.9	--	2.8	--	2.6	--	3.3	--
Malaysian Airline System	2.8	--	2.4	--	4.5	--	3.6	--
UTA French Airlines	2.7	--	3.1	--	3.2	--	3.5	--
Garuda Indonesian Airways	2.7	--	2.2	--	2.9	--	3.0	--
Gulf Air	2.2	--	1.9	--	3.8	--	3.3	--

INTERNATIONAL AIRLINES FLOWN

Table 2 (continued)

	U.S. respondents				Other N.A. respondents			
	1984	Rank	1981	Rank	1984	Rank	1979	Rank
Aeroflot	2.2%	--	2.1%	--	2.1%	--	3.1%	--
Alia	2.0	--	1.7	--	2.5	--	1.5	--
British Midland	2.0	--	1.2	--	3.1	--	1.2	--
Caribbean Airways	2.0	--	2.4	--	0.8	--	1.6	--
Kenya Airways	1.7	--	1.5	--	1.1	--	1.2	--
Pakistan Int'l	1.5	--	1.3	--	1.7	--	2.5	--
JAT	1.5	--	1.4	--	1.3	--	1.3	--
Kuwait Airways	1.4	--	1.0	--	1.5	--	1.9	--
Dan Air	1.3	--	0.9	--	1.5	--	1.2	--
Royal Air Maroc	1.3	--	1.3	--	1.5	--	2.2	--
Air Afrique	1.3	--	1.7	--	1.9	--	1.9	--
Nigeria Airways	1.1	--	1.2	--	1.5	--	0.9	--
Middle East Airlines	1.1	--	--	--	2.1	--	--	--
Britannia Airways	1.0	--	0.8	--	1.1	--	1.1	--
Air Lanka	1.0	--	--	--	1.7	--	--	--
Malev	1.0	--	0.7	--	0.8	--	1.4	--
Air Algerie	0.8	--	0.8	--	1.4	--	0.8	--
LOT	0.8	--	1.2	--	0.7	--	1.4	--
Ethiopian Airlines	0.8	--	0.7	--	0.6	--	0.8	--
THY	0.7	--	0.8	--	1.1	--	0.7	--
CSA	0.6	--	0.5	--	1.4	--	0.8	--
Cyprus Airways	0.6	--	0.3	--	1.7	--	1.3	--

INTERNATIONAL AIRLINES FLOWN

Table 2 (continued)

	U.S. respondents				Other N.A. respondents			
	1984	Rank	1981	Rank	1984	Rank	1979	Rank
Air UK	0.6%	--	1.0%	--	1.5%	--	1.4%	--
Ghana Airways	0.5	--	0.5	--	0.1	--	0.7	--
Iran Air	0.5	--	--	--	1.3	--	--	--
Tunis Air	0.4	--	0.6	--	0.8	--	1.1	--
Syrian Arab Airlines	0.4	--	0.3	--	0.6	--	0.5	--
Air Zaire	0.3	--	0.3	--	0.4	--	0.3	--
Balkan Bulgarian Airlines	0.3	--	0.2	--	0.4	--	0.6	--
Libyan Arab Airlines	0.3	--	0.4	--	0.7	--	0.5	--
Air Gabon	0.3	--	0.3	--	0.7	--	0.7	--
Air Mauritius	0.3	--	0.2	--	0.4	--	0.3	--
Air Malta	0.3	--	0.5	--	0.7	--	0.4	--
Iraq Airways	0.2	--	0.4	--	0.4	--	0.4	--
Other	12.2	--	--	--	20.3	--	--	--

IN-FLIGHT SERVICE

****

By and large, U.S. respondents' opinions as to which international carriers provide the best and worst in-flight service are consistent, and the total U.S. ratings are quite representative of those in each region. As a rule, Other N.A. residents' ratings differ substantially from those of U.S. respondents only with regard to their home country airlines (e.g. Mexicana, Air Canada).

Respondents most frequently name Swissair and Lufthansa as the international carriers with the best in-flight service. U.S. residents most often point to British Airways as having the poorest in-flight service, while other N.A. residents think that Aeromexico offers the poorest service.

INTERNATIONAL AIRLINES WITH THE BEST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% total mentions)

U.S. respondents		Other N.A. respondents	
Swissair	21.1%	Lufthansa	24.7%
Lufthansa	20.1	Swissair	20.3
British Airways	15.6	KLM	18.2
Singapore Airlines	15.4	Air France	16.6
KLM	14.7	Canadian Pacific	16.5
JAL	13.1	Mexicana	15.4
SAS	10.5	Air Canada	14.7
Air France	8.6	British Airways	13.8
Cathay Pacific	7.5	Singapore Airlines	12.6
Air Canada	6.1	JAL	11.2
Thai Airways Int'l	5.4	Varig	10.5
Qantas	5.1	SAS	6.8
		Cathay Pacific	5.1
		Thai International	5.1

INTERNATIONAL AIRLINES WITH THE WORST IN-FLIGHT SERVICE
(Includes airlines with at least 5.0% mentions)

U.S. respondents	
British Airways	17.6%
Alitalia	10.1
Mexicana	5.9
Air France	5.7
Iberia	5.4
Aeromexico	5.2

Other N.A. respondents	
Aeromexico	26.2%
Iberia	10.5
Alitalia	10.3
British Airways	9.4
Mexicana	7.6
Air France	7.4
Air Canada	6.5
Avianca	5.6

GROUND SERVICE

****

All American respondents agree that Swissair and Lufthansa offer the best international ground service. U.S. residents designate British Airways and Alitalia as the international carriers with the worst ground service while Other N.A. residents indicate that Aeromexico and Mexicana are the worst in this respect.

INTERNATIONAL AIRLINES WITH THE BEST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

U.S. respondents	
Swissair	19.6%
Lufthansa	19.5
British Airways	13.6
KLM	12.5
Singapore Airlines	11.4
JAL	10.6
SAS	8.8
Air France	5.9
Cathay Pacific	5.5
Air Canada	5.1

Other N.A. respondents	
Lufthansa	23.9%
Swissair	20.0
KLM	16.0
Air Canada	14.3
British Airways	13.2
Canadian Pacific	11.8
Air France	10.7
JAL	9.9
Mexicana	9.2
Singapore Airlines	9.0
Varig	5.9

INTERNATIONAL AIRLINES WITH THE WORST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

U.S. respondents	
British Airways	15.5%
Alitalia	10.2
Mexicana	6.3
Air France	6.1
Aeromexico	5.8
Iberia	5.1

Other N.A. respondents	
Aeromexico	27.6%
Mexicana	12.8
Iberia	11.6
Alitalia	9.6
British Airways	8.6
Air France	5.9

MOST PREFERRED INTERNATIONAL AIRLINES

****

Respondents named up to four international airlines they most prefer to fly. Since U.S. regional differences are generally small, only total figures are considered. All respondents agree that Swissair and Lufthansa are the most commonly preferred international carriers, with BA in third place among US respondents and KLM is a close runner-up among Other N.A. residents.

MOST PREFERRED INTERNATIONAL AIRLINES
(Includes airlines with at least 5.0% total mentions)

U.S. respondents		Other N.A. respondents	
Swissair	23.5%	Lufthansa	26.3%
Lufthansa	22.3	Swissair	24.9
British Airways	16.9	KLM	22.8
Singapore Airlines	16.3	Air France	18.9
KLM	16.1	Singapore Airlines	15.4
JAL	12.2	Canadian Pacific	15.0
SAS	12.1	British Airways	14.7
Air France	8.6	Air Canada	13.0
Cathay Pacific	7.1	JAL	10.6
Qantas	5.1	Varig	9.3
		Mexicana	9.3
		SAS	8.2
		Cathay Pacific	6.1

With regard to the one international airline most prefered, findings are similar to those obtained in 1981 and 1979, with U.S. respondents naming Swissair and Lufthansa. Other N.A. residents frequently name Swissair, Lufthansa and Air France as most preferred. Canadian Pacific has improved its ranking to third place this year.

SINGLE MOST PREFERRED INTERNATIONAL AIRLINE
(Top ten)

U.S. respondents				Other N.A. respondents			
	1984	1981	1979		1984	1981	1979
Swissair	13.9	9.7	6.3	Swissair	13.4	9.4	13.1
Lufthansa	10.0	6.6	4.9	Lufthansa	10.5	9.7	9.1
Singapore Airlines	8.3	4.2	2.4	Canadian Pacific	9.3	7.0	---
British Airways	7.5	4.7	4.8	Air France	8.3	10.5	5.9
KLM	7.3	5.0	4.3	Air Canada	7.3	7.8	2.0
JAL	5.2	4.5	3.5	KLM	6.5	8.0	6.1
SAS	5.2	4.0	3.1	Singapore	5.9	3.9	7.3
Air France	3.1	3.3	3.2	JAL	4.7	4.0	3.0
British Caledonian	2.1	---	---	Mexicana	4.7	---	---
Qantas	2.1	---	---	British Airways	4.0	4.2	6.2

In current findings, Alitalia, British Airways and El Al Israel Airlines receive the most frequent mentions as the international carriers to be avoided.

INTERNATIONAL AIRLINES THAT WOULD BE AVOIDED
****

As in the 1981 findings, Other N.A. residents most often designate Aeromexico as the international airline they would most often avoid.

INTERNATIONAL AIRLINES TO BE AVOIDED
(Top ten)

U.S. respondents				Other N.A. respondents			
	1984	1981	1979		1984	1981	1979
Alitalia	12.0%	5.3%	6.4%	Aeromexico	54.6%	56.6%	55.5%
British Airways	11.1	6.2	5.3	Alitalia	14.5	3.7	6.5
El Al Israel	9.5	--	--	Iberia	9.6	4.8	5.5
Aeroflot	8.1	3.8	1.7	El Al Israel	8.4	--	--
Iran Air	7.5	3.6	--	British Airways	7.9	5.2	6.5
Mexicana	7.1	--	--				
Iberia	6.0	--	--	Mexicana	6.8	--	--
Aeromexico	5.7	2.6	1.8	Avianca	7.4	--	--
Air France	6.1	2.4	3.3	Aeroflot	6.1	4.1	2.0
Egyptair	5.1	--	--	Air France	6.1	2.4	3.3
				Egyptair	5.6	--	--

There are no major differences in choice of international airlines to be avoided according to U.S. area of residence.

****

AIRLINE USAGE

****

ROUND TRIP FREQUENCY DURING PAST TWO YEARS

****

Respondents were asked to indicate how many round trips for business and pleasure they had taken within and outside of North America on a commercial airline during the past two years. In addition, they indicated how many of these trips included an overnight stay.

U.S. respondents' business and pleasure trips are skewed heavily towards travel within North America. Other N.A. respondents travel far less for business in North America than do U.S. respondents, although their reported frequency of business travel outside of North America is double that of U.S. respondents. Among both US and other N.A. respondents, patterns of pleasure travel within North America are similar, although the former group takes slightly fewer leisure trips outside North America than does the latter. The following groups indicate the highest frequency of business travel:

* Men
* First Class Flyers
* Business Class Flyers
* Persons who have flown on the major domestic carriers during the past two years.

Pleasure travel frequency is stable across the demographic/geographic groups.

Table 3

ROUND TRIP FREQUENCY DURING THE PAST TWO YEARS.

	U.S. respondents			Other N.A. respondents		
	1984	1981*	1979*	1984	1981*	1979*
Business:		18.1	17.7		16.2	16.3
Within North America (Total)	34.6			19.0		
Within North America (inc. overnight stay)	29.9			15.8		
Outside North America (Total)	5.6			10.7		
Outside North America (inc. overnight stay)	5.5			8.1		
Pleasure:		2.7	2.5		3.4	2.6
Within North America (Total)	4.9			4.8		
Within North America (Inc. overnight stay)	4.6			3.8		
Outside North America (Total)	2.0			3.4		
Outside North America (Inc. overnight stay)	2.0			2.6		

* Only total figures for business and pleasure round trips available for these years.

CLASS FLOWN MOST OFTEN

****

Currently, slightly fewer than half (43.0%) of the U.S. respondents generally fly economy, while 30 % most often fly discount and the remaining quarter are fairly evenly divided between those who most often fly first class (11.9%) or business class (15.1%). There has been a 7% shift away from economy fares during the last two years.

Other N.A. survey participants lean far more heavily toward business class travel than do U.S. respondents. At the same time, Other N.A. residents are far less attracted to discount fares than are the U.S. respondents. Incidence of first class and economy class travel is comparable between these two groups of respondents. Similar to findings for U.S. respondents, Other N.A. respondents show a 5% shift away from economy class and toward discount class compared to two years ago.

For all 1984 American survey respondents, men show a slightly greater tendency to fly first or business class than do women, while women tend to travel economy and discount class.

CLASS FLOWN MOST OFTEN

(1984)

	U.S. respondents	Other N.A. respondents	Male	Female
First class	11.9%	11.1%	12.4%	7.4%
Business class	15.1	26.8	16.8	8.5
Economy (full fare)	43.0	46.0	42.2	48.7
Discount	30.0	16.0	28.6	35.4

(1982)

	U.S. respondents	Other N.A. respondents	Male	Female
First class	14.8%	18.3%	15.7%	10.1%
Business class	11.9	18.9	12.9	6.8
Economy (full fare)	50.3	51.6	49.5	55.9
Discount	23.0	11.2	21.8	27.1

CHOOSING A FLIGHT

****

For both business and leisure travel, respondents generally select a flight themselves, although most consult with travel agent, an airline guide, or an airline brochure prior to doing so. Other N.A. respondents are more likely to consult a travel agent than are U.S. residents.

HOW FLIGHT USUALLY SELECTED

	Business trip		Pleasure trip	
	U.S. respondents	Other N.A. respondents	U.S. respondents	Other N.A. respondents
Choose flight myself after referring to airline guide	40.6%	27.1%	34.7%	21.2%
Choose flight myself after consulting travel agent	32.0	42.6	42.1	55.5
Choose flight myself after referring to airline brochure.	11.3	14.7	12.4	12.7
Travel agent chooses flight	4.7	3.7	5.6	6.0
Choose flight myself after consulting secretary	3.6	3.7	1.6	1.7
Choose flight myself after consulting corporate travel department	2.2	3.3	0.9	1.3
Corporate travel department chooses flight	2.0	1.6	0.1	0.3
Secretary chooses flight	2.0	2.0	0.5	--
Other	1.7	1.2	2.1	1.4

IMPORTANT FACTORS IN CHOOSING AN AIRLINE

Regardless of the length of the flight, U.S. residents consider four factors to be the most important in their choice of an airline:

- Convenient schedule
- Low fares
- Past experience (ranked fourth for flights of two hours or longer)
- Frequent flyer program (ranked third for flights of two hours or longer)

Other N.A. respondents share U.S. passengers' concern with convenient schedules, as this is the number one priority regardless of flight duration. However, they give notably less precedence to low fares than do their U.S. counterparts. In addition, quality of in-flight service consistently receives higher overall priority among Other N.A. respondents than among U.S. respondents.

When choosing an airline for short flights (under two hours) all respondents most often consider schedule and past experience with the airline, while for longer flights quality of service becomes more crucial as flight frequency and punctuality diminish in importance.

Table 4

MOST IMPORTANT FACTORS IN CHOOSING AN AIRLINE

Flights Under 2 hours

	U.S. respondents		Other N.A. respondents	
	Average	Rank	Average	Rank
Convenient schedule	72.8%	1	67.0%	1
Low fares	35.4	2	19.7	5
Past experience	31.2	3	32.7	3
Frequent flyer programme	28.7	4	11.3	10
Frequency of flights	27.2	5	35.9	2
On-time performance	15.8	6	24.4	4
Attitude of personnel	14.9	7	11.5	9
Safety record	12.7	8	16.1	6
Aircraft type	12.0	9	14.1	7
Quality of in-flight service	8.3	10	13.4	8
Quality of food and drinks	3.7	11	6.3	11
Quality of ground service	3.0	12	5.7	12
Availability of business class	2.6	13	3.7	13
Other	0.9	14	1.3	14

Table 4 (Continued)

Flights of 2 - 5 hours

	U.S. respondents		Other N.A. respondents	
	Average	Rank	Average	Rank
Convenient schedule	65.6%	1	61.4%	1
Low fares	34.5	2	21.8	4
Past experience	30.9	4	29.7	2
Frequent flyer programme	31.7	3	14.0	9
Frequency of flights	12.7	9	13.4	11
On-time performance	12.5	10	17.3	6
Attitude of personnel	17.3	6	14.6	8
Safety record	12.8	8	16.3	7
Aircraft type	17.4	5	19.0	5
Quality of in-flight service	15.3	7	26.5	3
Quality of food and drinks	8.5	11	13.6	10
Quality of ground service	3.0	13	4.8	13
Availability of business class	5.2	12	7.8	12
Other	1.0	14	1.5	14

Table 4 (Continued)

Flights over 5 hours

	U.S. respondents		Other N.A. respondents	
	Average	Rank	Average	Rank
Convenient schedule	53.7%	1	43.4%	1
Low fares	34.4	2	26.0	5
Past experience	30.2	4	28.0	3
Frequent flyer programme	30.6	3	12.7	11
Frequency of flights	8.1	11	7.2	12
On-time performance	9.8	10	12.7	10
Attitude of personnel	17.6	7	16.4	8
Safety record	15.4	8	19.0	7
Aircraft type	24.5	5	27.5	4
Quality of in-flight service	20.7	6	32.7	2
Quality of food and drinks	12.0	9	21.0	6
Quality of ground service	2.8	13	4.8	13
Availability of business class	7.4	12	12.9	9
Other	1.5	14	1.7	14

SINGLE MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT
****

Schedule is the single most important factor in the selection of a flight lasting less than two hours. For somewhat longer flights (2-5 hours), schedule is still a prime consideration; however, the airline to be flown also has substantial importance, especially for Other N.A. residents. For flights lasting more than five hours, the airline is the single most important criterion, again being even more important to Other N.A. respondents than U.S. residents. Regardless of the flight duration, fare and aircraft are secondary considerations, although the importance of each increases for longer flights.

MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT - 1984

Flights Under 2 Hours

	U.S. respondents	Other N.A. respondents
Schedule	64.0%	65.9%
Airline	16.5	19.1
Fare	16.3	12.1
Aircraft	2.5	2.5
Other	0.8	0.3

Flights 2 - 5 hours

	U.S. respondents	Other N.A. respondents
Schedule	42.8%	38.5%
Airline	27.9	36.4
Fare	20.4	15.7
Aircraft	8.1	8.7
Other	0.9	0.6

Flights of 5 hours

	U.S. respondents	Other N.A. respondents
Schedule	26.0%	19.4%
Airline	34.0	44.3
Fare	22.5	19.5
Aircraft	16.5	16.2
Other	1.0	0.7

EVALUATION OF OVERALL AIRLINE SERVICES
****

At least one fifth of the 1984 American survey respondents name each of the following airline services as being among the most important.

- Pre-reserved seat assignment
- Fast check-in
- Flight attendant attitude/behaviour
- Leg-room
- Quick baggage retrieval
- Carry-on baggage compartments
- Seat width
- Food service (Other N.A. respondents only)

At the same time, these services are the most commonly designated as needing improvement. The following services receive the most complaints (at least 40% of the respondents):

- Quick baggage retrieval
- Leg-room
- Seat width
- Fast check-in

Table 5

EVALUATION OF AIRLINE SERVICES

	Among the most important services		Needs improvement	
	U.S. respondents	Other N.A. respondents	U.S. respondents	Other N.A. respondents
Pre-reserved seat assignment	66.1%	46.4%	21.9%	23.7%
Fast check-in	40.3	46.4	42.2	46.2
Flight attendant attitude/behaviour	36.9	42.8	29.6	32.9
Leg-room	35.8	35.5	54.9	49.5
Quick baggage retrieval	31.0	29.9	61.2	59.7
Carry-on baggage compartments	28.9	19.9	36.2	30.4
Seat width	25.4	22.0	46.0	40.0
Food service	14.8	22.4	34.5	35.1
Special first class and business class lounges	8.0	14.7	7.8	10.1
Availability of sky-caps/porters	4.6	2.7	13.0	8.5
Adequate waiting areas	4.3	7.6	16.1	22.2
Beverage service	2.7	4.6	7.1	9.5
In-flight audio/video entertainment	2.3	4.2	6.9	10.9
Magazines and newspapers	1.5	3.3	6.4	12.2
Other	1.5	0.7	2.8	2.5

ATTITUDES TOWARDS AIRFARES

****

Regardless of demographic/geographic group, three quarters of this year's American survey participants consider current air fares to be expensive; almost half describe fares as somewhat expensive, and one in four think think that they are very expensive.

EVALUATION OF AIRFARES

	U.S. respondents	Other N.A. respondents
Very expensive	28.1%	26.3%
Somewhat expensive	45.8	48.3
Approximately as expected	22.4	22.8
Somewhat inexpensive	3.3	2.4
Very inexpensive	0.5	0.1

ATTITUDES TOWARD DEREGULATION

In 1981, almost half of the American respondents felt that air travel had improved due to industry deregulation, while others were fairly evenly divided as to whether air travel had deteriorated or remained unaffected. 1984 findings indicate that half of the Other N.A. respondents still feel that deregulation has improved, but there has been a sharp increase in the number of U.S. residents who have found air travel to have deteriorated due to deregulation.

PERCEIVED EFFECTS OF DEREGULATION

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
Air travel has improved	35.2%	43.3%	51.2%	44.8%
Air travel has deteriorated	49.2	30.8	30.0	24.6
Air travel has not been affected.	15.6	25.8	18.8	30.5

Respondents perceive the major advantages and disadvantages of deregulation to be as follows:

PERCEIVED ADVANTAGES OF DEREGULATION

	1984 U.S. respondents	1984 Other N.A. respondents
Lower fares	64.9%	71.7%
More competition	59.3	56.6
Larger choice of airlines	34.6	27.2
More flights (better schedules)	26.3	26.7
Amenities for business passengers	19.0	17.3
Better service	15.0	24.9
Less crowded aircraft	10.4	12.4

PERCEIVED DISADVANTAGES OF DEREGULATION

	1984 U.S. respondents	1984 Other N.A. respondents
Fewer flights (worse schedules)	53.7%	39.4%
Crowded aircraft	51.7	51.7
More confusion	47.8	46.3
Worse service	43.7	39.8
Higher fares	35.4	18.9
Business passenger neglect	32.6	29.0
Fewer choices of airlines	20.2	15.9

FREQUENT FLYER PROGRAMS

More than half of this year's U.S. respondents and one third of the Other N.A. respondents fly at least one airline more often than others because of membership in its frequent flyer program.

IS THERE AN AIRLINE YOU FLY MORE OFTEN BECAUSE OF ITS FREQUENT FLYER PROGRAM ?

	1984 U.S. respondents	1984 Other N.A. respondents
Yes	57.8%	35.9%
No	42.2	64.1

Those who answered yes to the above question were asked to what lengths they would be likely to go to fly on the airlines with their preferred frequent flyer program. The results are as follows:

IN ORDER TO FLY ON THE AIRLINE WITH PREFERRED FREQUENT FLYER PROGRAM RESPONDENT WOULD:

	U.S. respondents				Other N.A. respondents			
	Very likely	Somewhat likely	Somewhat 1981	Somewhat unlikely	Very likely	Somewhat likely	Somewhat 1981	Somewhat unlikely
Make more stops en-route	16.7%	26.3%	19.9%	37.1%	16.4%	25.9%	21.7%	36.0%
Pay slightly higher fare	11.7	26.8	28.0	33.5	11.4	27.6	29.7	31.4
Fly at a less convenient time	23.5	40.4	18.7	17.5	31.8	35.4	14.6	18.2
Take a circuitous route	8.7	16.5	24.1	50.7	9.9	21.0	19.3	49.7

****

AIRCRAFT EXPERIENCE

****

AIRCRAFT FLOWN DURING PAST TWO YEARS

Respondents were provided with a list of aircraft and asked on which they had flown during the past two years. As in previous years, the Boeing 727 is the plane most frequently flown by American respondents. In all, the most frequently flown aircraft (flown by at least two-thirds of U.S. and Other N.A. respondents) are as follows:

AIRCRAFT FLOWN DURING PAST TWO YEARS

	U.S. respondents			Other N.A. respondents		
	1984	1981	1979*	1984	1981	1979*
727	92.5%	92.0%	95.1%	91.8%	91.9%	93.0%
DC-10	80.0	83.5	88.9	90.1	89.2	92.5
747	78.8	74.5	87.0	86.0	86.3	95.4
737	76.4	59.8	69.2	67.3	52.8	74.9
L-1011	75.5	71.3	73.3	66.4	69.7	66.0
DC-9	71.6	75.3	79.8	76.6	84.2	86.3
DC-8	47.1	59.8	78.9	52.2	72.7	86.9
A300	36.1	24.7	15.5	41.5	28.9	47.7
767	35.8	----	----	24.5	----	----
DC-9/80	32.4	----	----	34.8	----	----
757	25.5	----	----	13.7	----	----
BAC 1-11	23.7	----	----	22.7	----	----
F-28	12.4	----	----	14.2	----	----
A310	9.2	----	----	17.6	----	----
Concorde	6.0	5.4	5.6	11.9	12.0	14.7

* No time limit specified

IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

For a flight lasting under two hours, almost half of the 1984 American respondents feel that safety and overall comfort rank among the most important factors in aircraft preference. In addition, about one in three respondents cites leg room, past experience and spaciousness as important criteria. For longer flights, comfort, leg-room and spaciousness become increasingly important, while safety and past experience become slightly less critical.

Women are definitely more concerned with safety than are men.

Table 6

IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

U.S. Respondents

Duration of flight:	Under 2 hours		2 - 5 hours		Over 5 hours	
	Mean	Rank	Mean	Rank	Mean	Rank
Safety	44.0%[1]	1	40.5%[2]	3	40.6%[3]	3
Overall comfort	42.2	2	47.5	1	51.0	1
Leg room	34.8	3	39.9	4	39.4	4
Past experience	32.7	4	27.1	6	24.8	6
Spaciousness	30.2	5	40.8	2	47.0	2
Baggage storage	26.5	6	16.8	7	12.4	8
Seat width	24.0	7	28.2	5	28.6	5
Noise level	15.9	8	15.1	8	14.4	7
Reputation	12.3	9	9.6	9	9.2	9
Manufacturer	5.3	10	5.0	11	4.9	11
Overall size	4.7	11	5.1	10	6.2	10

[1] Males 41.9% vs. females 66.8%
[2] Males 38.5% vs. females 61.8%
[3] Males 38.5% vs. females 60.7%

Table 6 (Continued)

Other N.A. Respondents

Duration of flight:	Under 2 hours		2 - 5 hours		Over 5 hours	
	Mean	Rank	Mean	Rank	Mean	Rank
Safety	47.7%[1]	1	44.5%[2]	1	42.6%[3]	3
Overall comfort	39.6	2	43.1	3	46.9	2
Leg room	29.9	4	36.5	4	35.5	4
Past experience	33.2	3	26.6	5	23.6	6
Spaciousness	29.0	5	43.6	2	49.3	1
Baggage storage	21.8	6	12.2	8	9.1	9
Seat width	20.4	7	25.7	6	29.0	5
Noise level	19.5	8	18.5	7	16.9	7
Reputation	14.5	9	10.5	9	10.5	8
Manufacturer	7.2	10	4.5	10	5.5	10
Overall size	4.4	11	4.5	10	3.4	11

[1] Males 41.9% vs. females 66.8%
[2] Males 38.5% vs. females 61.8%
[3] Males 38.5% vs. females 60.7%

MOST PREFERED AIRCRAFT

Similar to 1981 findings for flights under two hours, respondents most commonly prefer to fly the Boeing 727. For longer flights, the Boeing 747 is the most popular choice, followed by the Lockheed L-1011 and the McDonnell Douglas DC-10. These findings are consistent in demographic/geographic subgroups.

Table 7

MOST PREFERRED AIRCRAFT

Flights under 2 hours

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
727	32.6%	38.8%	39.2%	41.5%
737	13.1	12.1	11.3	9.9
L-1011	10.6	15.1	9.0	12.4
747	7.7	7.3	7.9	7.7
767	7.1	---	4.5	---
DC-9/80	6.5	---	3.2	---
DC-9	5.7	9.0	5.8	8.4
DC-10	5.6	10.5	5.8	9.8
A300	4.4	3.5	8.1	6.5
757	4.2	---	1.9	---

Table 7 (continued)

Flights of 2-5 hours (1984)/3+ hours (1981)

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
747	26.3%	46.7%	31.4%	49.0%
L-1011	26.0	28.3	19.0	21.3
DC-10	15.9	18.0	22.7	20.2
727	8.6	2.8	8.9	2.2
767	8.6	---	5.4	---
757	3.4	---	1.7	---
A300	2.6	0.8	4.1	1.0
737	2.5	---	1.3	---
Concorde	2.1	1.4	3.1	4.5
DC-9/80	1.3	---	0.7	---

Flights of 5+ Hours

	1984 U.S. respondents	1984 Other N.A. respondents
747	57.4%	61.8%
L-1011	19.2	15.2
DC-10	11.1	12.3
Concorde	3.7	12.7
767	3.3	6.8
727	1.3	0.9
757	1.2	1.8
737	0.9	1.3
A300	0.8	0.7
DC-8	0.3	0.4

AIRCRAFT THAT WOULD BE AVOIDED

For flights lasting under two hours, respondents would most commonly seek to avoid the McDonnell Douglas DC-9. The DC-10, BAC 1-11 and DC-8 also receive relatively frequent mentions for this question.

For two to five hour flights, U.S. respondents would most often avoid the McDonnell Douglas DC-10 and DC-9, while Other N.A. residents mention the DC-9 and DC-8 as the aircraft to be avoided.

For flights over five hours, respondents name the McDonnell Douglas DC-10 as the aircraft to be avoided while among Other N.A. respondents, the DC-8, DC-10 and DC-9 all receive relatively frequent mentions.

(The L-1011, DC-9/80, 767 and 757 received less than 3% mentions.)

Table 8

AIRCRAFT TO BE AVOIDED

Flights of under 2 hours

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
DC-9	17.9%	26.6%	25.4%	31.8%
DC-10	16.1	17.8	12.6	12.8
BAC 1-11	10.8	----	8.1	----
DC-8	10.2	11.1	15.1	19.9
737	9.6	8.8	5.4	5.6
727	9.2	9.5	6.3	4.4
F-28	8.3	---	7.4	---
747	5.5	4.7	10.1	6.2
A300	3.4	2.7	2.0	1.8
Concorde	3.3	3.6	4.0	2.7

Table 8 (continued)

Flights of 2-5 hours (1984)/3+ hours (1981)

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
DC-10	18.6%	20.9%	13.3%	13.7%
DC-9	18.2	17.5	25.5	20.9
727	15.9	12.9	13.8	5.3
DC-8	11.5	13.7	18.6	26.7
737	9.4	5.7	6.8	4.7
BAC1-11	6.6	---	5.9	---
F-28	5.7	---	3.7	---
A300	3.3	2.1	2.4	1.8
L-1011	3.2	2.7	2.0	2.4
747	2.1	4.6	3.3	6.0

Flights of 5+ Hours

	1984 U.S. respondents	1984 Other N.A. respondents
DC-10	22.6%	18.1%
727	16.6	13.9
DC-8	14.4	24.9
DC-9	13.3	18.1
737	6.9	4.0
BAC1-11	5.1	2.4
F-28	4.7	3.1
L-1011	4.0	4.0
A300	3.4	2.6
747	2.9	4.0

PERCEPTIONS OF COMMERCIAL AIRCRAFT MANUFACTURERS

The Boeing Commercial Airplane Company is by far the manufacturer most commonly perceived by American respondents to produce the best commercial aircraft.

AIRCRAFT MANUFACTURERS PERCEIVED TO PRODUCE THE BEST COMMERCIAL AIRCRAFT

	U.S. respondents		Other N.A. respondents	
	1984	1981	1984	1981
Boeing	75.1%	67.8%	75.4%	67.3%
McDonnell Douglas	11.4	13.3	11.4	13.9
Lockheed	11.2	17.1	9.6	15.4
Airbus Industrie	1.5	1.8	2.8	3.4
British Aerospace	0.4	---	0.5	---
Other	0.4	1.3	0.2	1.5

SMOKING ON THE AIRCRAFT

****

Almost 80% of this year's American respondents usually sit in the non-smoking section of the aircraft.

SECTION OF AIRCRAFT IN WHICH USUALLY SIT

	U.S. respondents	Other N.A. respondents
Smoking	20.1%	22.4%
Non-smoking	79.9	77.6

Well over half of the respondents favor the idea of a smoking ban on flights of under two hours in duration, and fewer than one in five would object to such a ban. On longer flights, about half the respondents (56.5% among Other N.A. residents) would favour a smoking ban, while about one in four voice an objection to this idea.

REACTIONS TO PROPOSED CIGARETTE SMOKING BAN

	On flights less than 2 hours		On flights 2 hours or more	
	1984	1981	1984	1981
Strongly in favor	57.8%	52.1%	44.0%	40.5%
Somewhat in favor	8.4	11.7	15.1	16.0
Makes no difference	16.2	20.3	16.6	20.1
Somewhat opposed	4.6	3.8	5.6	6.3
Strongly opposed	13.0	12.1	18.8	17.2

****

AIRPORT FACILITIES

****

1984 respondents reported into which domestic and international airports they have flown during the past two years.

DOMESTIC AIRPORTS FLOWN INTO DURING PAST TWO YEARS

In total, at least half of the U.S. respondents have flown into these U.S. airports within the last two years:

- Atlanta
- Chicago
- Los Angeles
- Dallas/Ft. Worth
- New York (Kennedy)
- San Francisco
- New York (La Guardia)

At least half of the Other N.A. respondents have flown into these U.S. airports during the last two years:

- New York (Kennedy)
- Los Angeles
- Dallas/Ft. Worth
- Chicago (O'Hare)

Table 9

DOMESTIC AIRPORTS FLOWN INTO DURING PAST TWO YEARS

	U.S. respondents	Other N.A. respondents
Atlanta	67.8%	45.4%
Chicago (O'Hare)	67.6	50.0
Los Angeles	60.4	59.1
Dallas/Ft. Worth	59.0	52.1
New York (Kennedy)	53.4	60.4
San Francisco	51.8	40.7
New York (La Guardia)	50.4	46.1
Denver	46.4	25.3
Washington (National)	44.3	22.4
Boston	42.2	31.9
Miami	40.7	48.3
Newark	36.3	18.2
Houston	35.6	46.7
St. Louis	34.8	12.2
Las Vegas	30.3	22.5
New Orleans	29.6	18.9
Philadelphia	28.4	16.3
Kansas City	27.9	7.0
Phoenix	27.9	13.4
Minneapolis/St. Paul	27.5	14.9
Tampa	27.1	16.3
Baltimore	27.0	10.5
Seattle/Tacoma	26.6	13.7
Pittsburgh	26.5	11.5
Honolulu	26.5	16.7
Detroit	26.4	15.1
Orlando	25.7	16.7
San Diego	22.9	19.2
Ft. Lauderdale	22.8	13.3
Cleveland	22.6	11.3
Washington (Dulles)	22.4	14.6
Houston (Hobby)	20.7	20.0
Charlotte	20.6	6.8
Cincinnati	19.7	6.9
Chicago (Midway)	19.6	9.9
Memphis	18.7	5.0
Salt Lake City	17.9	6.8
Dallas (Love Field)	15.8	8.4
Portland	15.6	5.2
Milwaukee	13.9	4.8
Birmingham	9.8	1.4
Tucson	8.3	4.6
Other	32.2	25.0

Respondents also indicated which U.S. airports they have used most frequently during the past two years. In each region, at least 20% of the respondents mention the following U.S. airports:

Table 10

DOMESTIC AIRPORTS USED MOST FREQUENTLY IN PAST TWO YEARS

U.S. Total	U.S. East	U.S. South/ South Central	U.S. North Central	U.S. West	Other N.A.
Chicago O'Hare (41.3%)	New York La Guardia (42.3%)	Atlanta (58.3%)	Chicago O'Hare (73.7%)	Los Angeles (63.5%)	New York Kennedy (41.1%)
Atlanta (35.5%)	Chicago O'Hare (40.8%)	Dallas/ Ft. Worth (45.6%)	Atlanta (33.2%)	San Francisco (45.5%)	Los Angeles (36.1%)
Los Angeles (29.4%)	New York Kennedy (40.8%)	Chicago O'Hare (25.7%)	New York La Guardia (25.7%)	Chicago O'Hare (35.4%)	Miami (31.5%)
New York Kennedy (25.8%)	Atlanta (31.8%)				Chicago O'Hare (31.3%)
New York La Guardia (25.4%)	Washington National (30.1%)			Denver (31.7%)	Houston Int. (31.0%)
Dallas Ft.Worth (25.2%)	Newark (26.6%)			Dallas Ft. Worth (25.6%)	Dallas Ft. Worth (29.4%)
	Los Angeles (22.8%)			New York Kennedy (25.5%)	New York La Guardia (25.2%)

INTERNATIONAL AIRPORTS FLOWN INTO DURING PAST TWO YEARS

Regardless of U.S. area of residence, nearly half the 1984 respondents report having flown into London (Heathrow) International Airport (44.3%) within the last two years. Additionally, about 20% have flown into:

*	Honolulu	26.9%
*	Frankfurt	26.8
*	Toronto	23.6
*	Paris (de Gaulle)	22.0
*	Mexico City	21.0
*	London (Gatwick)	19.8
*	Montreal	19.7
*	Amsterdam	19.5
*	Tokyo	19.0

All 1984 American respondents designate London (Heathrow) and Frankfurt as being among the five international airports used most frequently during the past two years.

By area of residence, the international airports used most frequently by at least 20% of the respondents are as follows:

U.S. Total	U.S. East	U.S.South/ South Central	U.S. North Central	U.S. West	Other N.A.
London (Heathrow) (49.7%)	London (Heathrow) (53.8%)	London (Heathrow) (44.9%)	London (Heathrow) (50.3%)	London (Heathrow) (50.6%)	Mexico City (41.3%)
Frankfurt (22.7%)	Frankfurt (23.5%)	London (Gatwick) (25.8%)	Frankfurt (25.3%)	Honolulu (29.3%)	London Heathrow (34.1%)
		Frankfurt (22.9%)		Frankfurt (20.7%)	Toronto (27.6%)
					Montreal (24.4%)
					Frankfurt (20.2%)

BEST LIKED AIRPORTS OVERALL

(NOTE: In previous years' surveys, respondents evaluated U.S. and international airports together, whereas in 1984, they evaluated them separately).

U.S. Airports

As in previous years, U.S. respondents most frequently name Tampa, Atlanta, and Dallas/Ft. Worth as their favourite U.S. airports. However, Dallas/Ft. Worth has shown a decline in popularity since 1981. By U.S. region of residence, the most favoured domestic airports (with at least 10% mentions) are:

East	South/ South Central	North Central	West
Newark (12.4%)	Atlanta (54.2%)	Tampa (16.8%)	San Francisco (13.1%)
Tampa (11.9%)	Tampa (21.6%)	Chicago O'Hare) (13.4%)	Seattle/ Tacoma (11.5%)
Atlanta (10.1%)	Dallas/ Ft. Worth (17.5%)	Atlanta (12.0%)	

As in earlier years, Dallas/Ft. Worth is the most popular U.S. airport among Other N.A. respondents. This year, Atlanta and Houston airports are also favoured among other N.A. residents.

International airports

Amsterdam and Frankfurt are the best liked international airports among 1984 U.S. respondents. This is true regardless of geographic subgroup. Similar to earlier years' results, Amsterdam, de Gaulle and Frankfurt airports are all popular with this year's other N.A. respondents.

Table 11

AIRPORTS LIKED BEST OVERALL

Domestic respondents

1984						
Domestic		International			1981*	1979*
Tampa	14.2%	Amsterdam	13.0%	Tampa	16.2%	13.8%
Atlanta	13.0	Frankfurt	11.0	Dallas/ Ft. Worth	13.7	13.5
Dallas/ Ft. Worth	8.5	London/ Heathrow	10.4	Atlanta	13.4	----
Newark	5.0	Honolulu	7.6	Chicago (O'Hare)	5.4	9.3
Chicago (O'Hare)	4.9	Paris (de Gualle)	7.4	Seattle	4.4	4.4
San Francisco	4.7	Zurich	6.5	Washington (Dulles)	4.1	5.6
Washington (Dulles)	4.6	Singapore	6.2	Newark	4.0	5.0
Seattle/Tacoma	3.9	Tokyo	3.8	Kansas City	3.0	2.9
Orlando	3.1	London (Gatwick)	3.4	New York (Kennedy)	2.2	3.5
New York (Kennedy)	2.8	Toronto	3.4	Los Angeles	2.1	3.9

Other N.A. respondents

1984						
Domestic		International			1981*	1979*
Dallas/ Ft. Worth	16.2%	Amsterdam	16.6%	Dallas/ Ft. Worth	14.7%	6.5%
Atlanta	11.9	Paris (de Gaulle)	13.4	Amsterdam	9.3	8.7
Houston Int'l	10.4	Frankfurt	11.9	Paris (de Gaulle)	8.4	8.9
Miami	6.5	Zurich	5.9	Tampa	7.4	3.9
Tampa	6.2	Singapore	5.9	Frankfurt	7.2	8.8
San Fransisco	5.8	Toronto	5.1	Atlanta	5.9	---
Boston	4.0	Mexico City	4.7	Toronto	4.3	2.7
Seattle/Tacoma	3.5	Vancouver	4.3	Chicago O'Hare	4.0	---
New York (Kennedy)	3.2	Montreal	4.2	Houston	3.6	---
Chicago O'Hare	2.8	London (Heathrow)	3.8	Seattle	3.1	---

* U.S. and International airports combined.

LEAST LIKED AIRPORTS OVERALL

(NOTE: In previous years' surveys, respondents evaluated U.S. and international airports together, whereas in 1984, they evaluated them separately).

U.S. airports

As in 1981 and 1979, current domestic respondents concur that Chicago (O'Hare) is the least liked domestic airport, with New York's Kennedy and Los Angeles also receiving relatively frequent mentions. These findings are fairly similar in each U.S. region.

Other N.A. respondents name Kennedy, Los Angeles and O'Hare, in that order, as the least favourite U.S. airports. These findings are similar to those obtained in earlier years.

International airports

London's Heathrow is decidedly the least popular international airport among U.S. respondents, regardless of region of residence. As in earlier years, Mexico City is Other N.A. respondents' least favored international airport, with Heathrow ranking in second place.

Table 12

AIRPORTS LIKED LEAST OVERALL

Domestic respondents

1984						
Domestic		International		1981*		1979*
Chicago (O'Hare)	16.9%	London (Heathrow)	22.2%	Chicago (O'Hare)	16.6%	16.8%
New York (Kennedy)	12.8	Mexico City	7.5	New York (Kennedy)	10.5	7.8
Los Angeles	10.9	Rome	6.8	Los Angeles	9.3	7.4
Atlanta	8.4	Cairo	4.3	Atlanta	7.0	16.6
Washington (National)	7.3	Tokyo	3.9	Washington (National)	5.5	4.8
Dallas/ Ft. Worth	7.0	Paris (de Gaulle)	3.3	New York (La Guardia)	5.0	3.8
New York (La Guardia)	6.3	Paris (Orly)	2.8	Dallas/ Ft. Worth	5.0	4.7
Miami	4.2	Frankfurt	2.8	Miami	3.4	2.6
Denver	3.4	Athens	2.8	Heathrow	3.0	---
Pittsburgh	1.9	Milan (Linate)	2.6	Denver	2.0	---

Other N.A. respondents

1984						
Domestic		International		1981*		1979*
New York (Kennedy)	21.1%	Mexico City	18.5%	New York (Kennedy)	9.6%	7.9%
Los Angeles	16.6	London (Heathrow)	15.9	Mexico City	9.4	2.5
Chicago (O'Hare)	14.0	Rome	5.7	Los Angeles	7.2	5.3
Miami	8.6	Montreal	5.7	Chicago (O'Hare)	6.5	3.0
New York (La Guardia)	7.7	Toronto	5.5	London (Heathrow)	6.3	8.4
Washington (National)	3.9	Madrid	4.9	Toronto	6.3	2.1
Dallas/ Ft. Worth	2.9	Cairo	4.5	Miami	5.2	11.3
Houston Int'l	2.3	Bombay	3.3	New York (La Guardia)	2.4	---
Atlanta	2.1	Bogota	3.3	Atlanta	1.6	---
Denver	1.6	Athens	1.8			

* U.S. and International airports combined.

EVALUATION OF AIRPORT SERVICES AND FACILITIES

From a list, 1984 American respondents indicated three service/facility factors that are most important to them in their evaluation of an airport. In addition, they indicated which items they feel need improvement. results are generally consistent across demographic/geographic subgroups.

For U.S. respondents, four airport features receive the most mentions as needing improvement, these are:

- Quick baggage claim
- Ease of changing planes
- Quick and easy check-in
- Short walking distance

Other N.A. respondents concur with the above but frequently add 'rapid customs clearance' as an important feature and one that is in need of improvement.

Table 13

1984 AMERICAN SURVEY RESPONDENTS' EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

	Named as one of three most important factors in airport evaluation		Needs improvement	
	1984	1981	1984	1981
Quick baggage claim	57.4%	59.6%	68.6%	66.8%
Ease of changing planes	52.7	42.4	49.3	45.7
Quick and easy check in	40.0	37.7	44.2	43.2
Short walking distance	36.0	32.2	47.2	43.2
Jetways (loading bridges)	18.5	14.1	7.5	8.0
Rapid customs clearance	15.3	46.6	30.3	61.0
Moving walkways	14.3	11.7	25.4	25.4
Comfortable waiting areas/ lounges	12.5	16.6	24.8	32.2
Nearby parking facility	12.1	1.9	27.1	12.4
Cleanliness	11.9	10.4	26.1	23.4
Availability of ground transportation	9.3	7.9	16.5	12.8
Good security	9.0	8.8	11.8	11.1
Frequently placed schedule monitors	5.7	4.0	14.7	17.2
Frequent transportation between terminals	5.5	4.0	24.2	17.5
Good restaurants	4.1	4.5	26.1	23.2
International signs/ directions/information	2.6	5.9	9.3	16.0
News stands	0.7	0.6	2.4	2.3
Duty-free shops	0.6	3.1	2.4	9.0
Other	1.0	0.6	2.0	1.5

PURCHASING DUTY-FREE GOODS

****

About 40% of the U.S. respondents and half of those living in Other N.A. areas often purchase duty-free goods when taking international trips.

HOW OFTEN 1984 SURVEY RESPONDENTS PURCHASE DUTY-FREE GOODS ON INTERNATIONAL FLIGHTS

	U.S. respondents	Other N.A. respondents
Very often	19.3%	27.5%
Somewhat often	19.0	25.1
Not very often	43.5	38.3
Not at all	18.2	9.0

As it stands now, the vast majority of those who purchase duty-free goods do so when departing for their home city rather than upon arrival in the home city.

WHEN 1984 AMERICAN SURVEY RESPONDENTS USUALLY PURCHASE DUTY-FREE GOODS

	U.S. respondents	Other N.A. respondents
When departing for home city	92.3%	84.8%
Upon arrival at home city	7.7	15.2

However, almost half of the respondents would like to make their duty-free purchases upon arrival at home instead of at the departure airport, and fewer than one in ten would object to doing so.

1984 AMERICAN SURVEY RESPONDENTS' ATTITUDES TOWARD PURCHASING DUTY-FREE GOODS AT HOME AIRPORT AFTER ARRIVAL

	U.S. respondents	Other N.A. respondents
Like strongly	33.2%	37.2%
Like somewhat	12.8	12.7
Don't care	46.8	40.2
Object somewhat	3.3	5.2
Object strongly	3.9	4.6

****

HOTEL FACILITIES

****

HOTEL/MOTEL USAGE DURING THE PAST TWO YEARS

****

Over the past two years, the average American survey respondent stayed in a hotel 84.4 nights for business purposes and 21.0 nights for pleasure.

Other N.A. respondents report lower hotel stay frequency for business and higher frequency for pleasure travel than do U.S. respondents.

First and Business Class travellers stay in hotels far more often for business than do economy and discount passengers. In addition, First Class passengers stay in hotels for pleasure more often than average.

Men report higher frequency of hotel stays for business and lower frequency for pleasure trips than do women.

AVERAGE NUMBER OF NIGHTS STAYED IN A HOTEL/MOTEL DURING THE PAST TWO YEARS FOR;

Area of Residence:	Business	Pleasure
U.S. (Total)	85.2	20.5
East	85.0	20.4
South/South Central	91.3	19.7
North Central	90.8	20.1
West	85.3	20.9
Other N.A. Respondents	74.3	26.8
Class Flown:		
First	100.5	25.6
Business	97.7	19.6
Economy	79.3	19.9
Discount	76.0	20.9
Sex		
Male	86.9	20.6
Female	53.9	24.0
Total:	84.4	21.0

With regard to the actual hotel chains frequented, the majority (i.e., at least half) of all the respondents report having stayed at these hotel chains during the past two years:

- Holiday Inn
- Hilton Hotels Corporation
- Sheraton
- Hyatt/Hyatt Regency

In addition, at least 50% of the U.S. residents have stayed at a Marriott (62.6%), Best Western (55.7%), and/or Ramada Inn (50.8%), and 53.4% of the Other N.A. respondents have spent a night at a Westin Hotel during the past two years.

No noteworthy differences in hotel/motel patronage occur between the U.S. geographic regions. However, first class travellers patronize the following hotel chains more often than average:

- Hyatt/Hyatt Regency (74.6%)
- Intercontinental (42.8%)
- Four Seasons (32.0%)
- Fairmont (27.3%)

In addition, heavy business travellers (25+ trips during past two years) demonstrate well above average patronage of these chains:

- Holiday Inn (89.0%)
- Hilton Hotels Corporation (88.0%)
- Sheraton (80.8%)
- Hyatt/Hyatt Regency (80.6%)
- Marriott (82.0%)
- Best Western (66.7%)
- Ramada Inns (67.7%)
- Howard Johnson's (51.1%)
- Quality Inns (40.5%)

Table 14

HOTEL CHAINS STAYED IN DURING THE PAST TWO YEARS BY 1984 AMERICAN RESPONDENTS

	U.S. respondents	Other N.A. respondents
Holiday Inns	78.8%	75.2%
Hilton	73.1	68.5
Sheraton	64.2	64.5
Hyatt/Hyatt Regency	62.9	59.4
Marriott	62.6	45.2
Best Western	55.7	39.3
Ramada Inns	50.8	32.9
Westin	40.9	53.4
Howard Johnson's	37.0	23.9
Quality Inns	30.4	16.6
Inter-Continental	25.6	39.9
Radisson	21.0	5.8
Days Inn	20.3	7.4
La Quinta Motor Inns	18.1	11.2
Four Seasons	18.0	30.4
Amfac	17.9	8.5
Travelodge	17.2	11.1
Fairmont	16.6	8.2
Stouffer	16.1	8.0
Americana	16.0	19.7
Rodeway Inns	15.6	8.5
Omni Dunfey	12.8	4.9
Red Lion	12.6	4.4
Trusthouse Forte	11.4	14.6
Granada Royle	11.4	4.9
Harley	10.9	5.5
Doubletree	10.0	4.9
Red Carpet Inns	8.6	3.2
Meridien	8.0	18.2
Loews	7.9	8.6
Friendship Inns	6.0	3.6
Canadian Pacific	5.3	23.2
Crowne Plaza	5.0	1.2
Preferred	4.9	3.6
Princess	4.9	12.2
Penta	4.1	7.2
Oberoi	2.3	5.4
Sheffield	1.1	0.8
Wandlyn Inns	0.6	3.9
Other	5.8	9.2

HOTEL PRICES

****

On average, 1984 respondents currently spend $70.20 per night for business lodgings and $68.90 for pleasure accommodation. U.S. travellers spend substantially less for accommodation than do Other N.A. respondents. In addition, hotel expenditures show a strong positive correlation to the airline class generally flown.

AVERAGE HOTEL ROOM EXPENDITURE PER NIGHT FOR:

	Business	Pleasure
Area of residence:		
U.S. (Total)	$69.50	$68.30
East	72.80	71.50
South/South Central	67.30	66.90
North Central	65.30	63.20
West	69.50	67.20
Other N.A.	79.10	76.20
Class flown:		
First	90.20	94.30
Business	77.60	74.40
Economy	65.90	64.40
Discount	63.10	61.40
Total	70.20	68.90

Regardless of demographic/geographic group, about 80% of the current American survey respondents find hotel prices to be expensive; hardly anyone thinks that lodgings are inexpensive.

PERCEIVED EXPENSE OF HOTEL COSTS

	U.S. respondents	Other N.A. respondents
Very expensive	30.3%	25.1%
Somewhat expensive	52.1	52.2
Approximately as expected	16.9	22.4
Somewhat inexpensive	0.5	0.4
Very inexpensive	0.1	0.1

SELECTION OF HOTEL ACCOMMODATION
****

Regardless of demographic/geographic group, the vast majority of American respondents select their own hotel accommodation.

WHO SPECIFIES THE HOTEL/MOTEL USED FOR:

	Business		Pleasure	
	U.S. Respondents	Other N.A. Respondents	U.S. Respondents	Other N.A. Respondents
Self	86.4%	87.2%	94.0%	93.3%
Travel agent	3.7	3.6	5.2	5.4
Business associate at destination	3.1	1.7	0.1	0.1
Dictated by company policy	2.7	2.1	0.1	---
Company travel department	2.2	3.0	0.1	---
Secretary	2.0	2.4	0.5	1.2

Except where noted, 1984 American respondents agree upon the relative importance of several factors in the selection of hotel/motel accommodations, as follows:

IMPORTANT FACTORS CONSIDERED IN CHOOSING A HOTEL

	U.S. respondents	Other N.A. respondents
Location	88.8%	90.8%
Past experience	68.5	71.4
Low price[1]	29.6	24.4
Special services/amenities[2]	21.9	21.2
Corporate rate availability	20.6	19.0
Airport shuttle availability	17.7	15.2
IAPA discount	11.7	23.9
Frequent-flyer program tie-in	7.7	3.2
Choice of smoking/non-smoking accommodations	6.7	5.7
Meeting/convention facilities	5.9	2.8
Executive floor/ suites availability[3]	5.3	5.2
Other	6.4	8.7

---

[1] Class Flown

First	Business	Economy	Discount
9.2%	16.2%	30.7%	42.6%

[2] 37.2% for first class travellers

[3] 18.4% for first class travellers

TYPE OF HOTEL ACCOMMODATIONS USED

****

For business travel about half (48.0%) of this year's American respondents stay in superior accommodations (deluxe is top accommodation) and an additional one-third (38.6%) use intermediate lodgings. About one in in ten (9.2%) stay in deluxe hotels/motels. Fewer than 5% stay at economy establishments when travelling for business. Other N.A. residents are somewhat more attracted to deluxe and superior lodgings for business travel than are U.S. respondents. In addition, there is a strong positive correlation between the class most frequently flown and the levels of hotel accommodation used most often.

For pleasure travel, most travellers are apt to choose superior (37.1%) or intermediate (39.1%) hotels, while 13.3% usually stay at deluxe establishments and 10.5% choose some type of economy lodging. These statistics are highly consistent across the geographic subgroups, but do show strong positive correlation to the airline class generally flown.

TYPE OF LODGING USED MOST OFTEN

For business

	Deluxe	Superior	Intermediate	Economy	Super Economy
Area of residence:					
U.S. (Total)	8.7%	47.5%	39.5%	3.6%	0.7%
East	10.0	50.0	36.2	2.8	0.9
South/South Central	8.0	45.4	42.2	4.0	0.4
North Central	5.5	44.7	44.8	4.6	0.5
West	9.1	48.6	38.5	3.1	0.7
Other N.A.	15.3	53.9	28.5	1.6	0.8
Class flown:					
First	30.0	55.7	13.2	0.4	0.1
Business	11.8	57.6	29.7	0.8	0.2
Economy	4.3	45.9	45.8	3.4	0.6
Discount	5.5	43.0	44.1	6.1	1.4
Total	9.2	48.0	38.6	3.5	0.7

For pleasure

	Deluxe	Superior	Intermediate	Economy	Super Economy
Area of residence:					
U.S. (Total)	13.1%	37.0%	39.3%	9.1%	1.6%
East	15.4	37.8	36.6	8.4	1.9
South/South Central	11.7	36.7	42.0	8.6	1.0
North Central	8.6	33.5	44.9	11.5	1.6
West	12.7	38.1	38.3	9.7	1.3
Other N.A.	16.0	37.5	37.5	6.2	2.7
Class flown					
First	35.5	44.1	17.6	2.3	0.6
Business	15.5	44.4	35.2	4.3	0.6
Economy	8.6	35.7	45.0	9.0	1.6
Discount	8.9	32.7	42.1	13.5	2.8
Total	13.3	37.1	39.1	8.8	1.7

EVALUATION OF HOTEL CHAINS

Favorite hotel chain

With generally consistent findings in the subgroups, 1984 American respondents name the following hotel chains as their favorites. (Major differences are noted.)

FAVORITE HOTEL CHAINS
(Top ten)

U.S. respondents		Other N.A. respondents	
Hyatt/Hyatt Regency	19.1%	Westin	17.4%
Marriott	15.4	Hyatt/Hyatt Regency	17.2
Holiday Inn[1]	12.7	Four Seasons	10.9
Westin	8.5	Sheraton	8.2
Hilton Hotels Corporation	7.4	Hilton Hotels Corporation	7.8
Sheraton	5.9	Marriott	7.6
Four Seasons[2]	4.9	Inter-Continental	7.4
Best Western	4.0	Holiday Inn	6.9
Inter-Continental	3.5	Best Western	2.0
Granada Royale	2.1	Canadian Pacific	2.0

1. 4.4% for first class travellers
2. 11.8% for first class travellers

Hotel chain with the best service

Respondents generally agree that the hotel chains below offer the best service.

HOTEL CHAINS WITH THE BEST SERVICE
(Top ten)

U.S. respondents		Other N.A. respondents	
Hyatt/Hyatt Regency	21.0%	Hyatt/Hyatt Regency	17.7%
Marriott	16.7	Westin	17.0
Westin	9.5	Four Seasons	13.5
Hilton Hotels Corporation	8.4	Marriott	9.0
Holiday Inns[1]	8.2	Hilton Hotels Corporation	8.8
Four Seasons[2]	5.6	Sheraton	8.1
Sheraton	5.2	Inter Continental	6.7
Inter Continental	3.8	Holiday Inn	4.3
Best Western	2.9	Canadian Pacific	2.9
Fairmont	2.3	Best Western	1.6

1. 2.8% for first class travellers
2. 12.4% for first class travellers

Hotel Chain with the poorest service

The hotel chain with the most common reputation for poor service is Holiday Inn, as shown below:

HOTELS CHAINS WITH THE POOREST SERVICE
(Top ten)

U.S. respondents		Other N.A. respondents	
Holiday Inn	23.4%	Holiday Inn	31.5%
Howard Johnson's	11.9	Hilton Hotels Corporation	9.4
Ramada Inns	9.9	Sheraton	8.2
Hilton Hotels Corporation	8.3	Ramada Inns	6.8
Days Inn	7.9	Howard Johnson's	6.5
Sheraton	7.6	Days Inn	4.6
Best Western	4.7	Best Western	4.4
Travelodge	4.2	Travelodge	3.1
Quality Inns	3.8	Marriott	3.1
Marriott	2.5	Inter Continental	2.9

Hotel chains with the best facilities

Consistent with their choices for favourite hotel and best services, American respondents feel that the following hotel chains offer the best facilities.

HOTEL CHAINS WITH THE BEST FACILITIES
(Top ten)

U.S. respondents		Other N.A. respondents	
Hyatt/Hyatt Regency	26.1%	Hyatt/Hyatt Regency	18.2%
Marriott	15.6	Westin	17.0
Westin	9.8	Four Seasons	10.0
Hilton Hotels Corporation	8.2	Hilton Hotels Corporation	9.6
Four Seasons*	5.9	Marriott	8.8
Sheraton	5.8	Sheraton	8.8
Holiday Inn	5.4	Inter Continental	6.2
Inter Continental	3.5	Holiday Inn	4.2
Granada Royale	2.4	Canadian Pacific	2.2
Fairmont	2.1	Princess	2.0

* 12.1% for first class travellers

Hotel chains with the poorest facilities

As with service, Holiday Inn is the hotel chain most frequently named as providing the poorest facilities.

HOTEL CHAINS WITH THE POOREST FACILITIES
(Top ten)

U.S. respondents		Other N.A. respondents	
Holiday Inn	21.1%	Holiday Inn	26.8%
Howard Johnson's	12.1	Ramada Inns	7.8
Ramada Inns	11.2	Best Western	7.8
Days Inn	11.0	Howard Johnson's	6.5
Travelodge	6.9	Days Inn	6.5
Best Western	6.5	Sheraton	5.7
Sheraton	5.2	Hilton Hotels Corporation	5.7
Quality Inns	5.1	Quality Inns	4.7
Hilton Hotels Corporation	4.1	Travelodge	4.4
Rodeway Inns	2.9	La Quinta Motor Inns	3.4

HOTEL ROOMS FOR SMOKERS AND NON-SMOKERS

****

Overall, slightly over half of the 1984 respondents favor separate hotel rooms for smokers and non-smokers, while about one in three is indifferent to this idea and fewer than one in ten oppose it. Women are especially strong advocates of hotels offering rooms for smokers and non-smokers.

FEELINGS ABOUT HOTELS THAT PROVIDE ROOMS FOR SMOKERS AND NON-SMOKERS

	U.S. respondents	Other N.A. respondents	Sex	
			Male	Female
Strongly in favour	46.1%	42.4%	44.9%	55.3%
Somewhat in favour	11.6	11.1	11.6	10.6
Makes no difference	35.7	39.4	36.6	29.2
Somewhat opposed	1.7	1.6	1.8	0.8
Strongly opposed	5.0	5.6	5.1	4.1

****

CAR RENTAL COMPANIES

****

RENTAL CAR USAGE DURING THE PAST TWO YEARS
****

Men and first class passengers show especially high levels of rental car usage. U.S. respondents are far more likely to rent cars for business travel than are Other N.A. respondents.

AVERAGE NUMBER OF TIMES RENTED A CAR DURING THE PAST TWO YEARS

		Sex		Class flown				Country of residence	
	Total	Male	Female	1st	Business	Economy	Discount	U.S.	Other N.A.
Business	22.0	23.0	9.7	27.9	23.4	21.4	19.7	22.6	15.0
Pleasure	3.8	3.9	2.8	5.2	4.0	3.4	3.9	3.8	4.5

Statistics for the actual car rental agencies used are generally similar to those in 1981, although Alamo has gained a significant market share over the past two years. The North American rental car market is still dominated by Hertz and Avis, and Budget and National, to a lesser degree.

RENTAL CAR AGENCIES USED DURING THE PAST TWO YEARS

	U.S. Respondents			Other N.A. Respondents		
	1984	1981	1979	1984	1981	1979
Hertz	78.2%	72.8%	80.3%	79.4%	73.6%	79.2%
Avis	72.1	65.8	79.0	78.2	73.0	81.3
Budget	63.6	54.7	61.5	64.3	63.0	55.8
National	60.2	53.9	64.3	58.4	42.5	45.6
Dollar	21.9	18.7	22.2	20.1	15.9	21.4
Alamo	17.4	---	---	10.1	---	---
Thrifty	12.8	10.1	---	8.7	6.9	---
American Int'l	11.5	13.2	12.9	4.5	3.9	6.3
Ajax	5.3	---	---	3.1	---	---
General	5.1	---	---	6.0	---	---
Showcase	0.3	---	---	---	---	---

The above 1984 findings are consistent across demographic/geographic subgroups.

SELECTION OF A CAR RENTAL COMPANY

Regardless of demographic/geographic group, the vast majority of 1984 American respondents generally choose their rental car agency themselves when travelling for business and pleasure - although a travel agent agent may actually book the reservation.

WHO CHOOSES RENTAL CAR COMPANY

	For business		For pleasure	
	U.S. respondents	Other N.A. respondents	U.S. respondents	Other N.A. respondents
Self	84.8%	88.8%	94.6%	94.6%
Dictated by company policy	5.7	3.0	0.2	----
Travel agent	4.0	3.0	3.9	3.5
Secretary	2.6	2.9	1.0	1.6
Company travel department	2.6	2.0	0.2	0.2
Business associate at destination	0.4	0.2	0.1	0.2

Overall, the two most important factors in selection of a rental car company are on-airport location and low price. The on-airport location is far more important for first and business class travellers, while low price is substantially more important for discount passengers. IAPA discounts are substantially more important to Other N.A. respondents than to U.S. respondents.

The most important factors in choosing a car rental agency, in order of rank, are as follows:

THE THREE MOST IMPORTANT FACTORS IN 1984 SURVEY RESPONDENTS' CHOICE OF A CAR RENTAL AGENCY

	U.S. respondents	Other N.A. respondents
On-airport location	56.3%	61.8%
Low price	49.9	43.2
Condition of cars	35.8	41.4
Fast pick-up and delivery service	35.7	31.7
Types of cars available	22.1	25.1
Guaranteed reservations	21.4	16.7
Express check-in/check-out	20.2	19.3
Corporate rate availability	20.0	12.2
IAPA discount	18.4	35.4
Courteous service	14.4	15.6
Frequent renter programs	5.9	20.2
Off-airport locations	1.8	1.8
Other	1.5	1.5

Class flown			
1st	Business	Economy	Discount
62.8	62.8	58.1	47.2

Class flown			
1st	Business	Economy	Discount
25.9	34.7	48.4	69.0

EVALUATION OF CAR RENTAL AGENCIES

Overall service

1984 respondents name Hertz as the car rental company with the best overall service, and Avis is in second place. This represents an improvement for Hertz' standing versus Avis among Other N.A. respondents in 1981 and 1979.

RENTAL CAR AGENCY PREFERENCE

	U.S. respondents			Other N.A. respondents		
	Best service overall	Most preferred agency		Best service overall	Most preferred agency	
	1984	1981	1979	1984	1981	1979
Hertz	37.3%	30.7%	29.0%	38.7%	28.8%	30.5%
Avis	23.1	20.8	27.8	31.3	29.6	39.7
National	18.4	21.4	22.7	13.3	9.8	14.0
Budget	13.6	16.8	15.5	11.9	23.9	12.1
Alamo	2.1	----	----	1.3	----	----
Dollar	1.3	2.5	2.0	0.9	1.4	2.9
American Int'l	1.3	2.7	2.2	0.5	----	----
Thrifty	1.1	2.0	----	0.4	----	----
Ajax	0.7	----	----	0.4	----	----
General	0.5	----	----	0.5	----	----
Other	0.6	2.6	----	0.9	5.1	0.8

About 40% of this year's U.S. respondents name either Hertz (19.9%) or Budget (19.6%) as the car rental agency with the poorest service overall. Other N.A. respondents designate Budget as the rental car company with the poorest service overall, with Avis, Hertz and National all coming close behind. Comparisons with earlier results are deceptive, as price was included in the 1981 respondents' selection of least preferred agency, whereas in 1984 price is considered separately.

RENTAL CAR AGENCY AVOIDANCE

	Poorest service overall	
	U.S. respondents	Other N.A. respondents
	1984	1984
Hertz	19.9%	15.8%
Budget	19.6	23.1
Avis	15.0	16.3
National	11.7	15.2
Alamo	9.6	7.9
Dollar	7.8	9.0
Thrifty	6.2	5.4
American International	4.5	1.6
Ajax	2.4	0.5
General	1.9	3.0
Other	1.4	2.1

Overall service evaluation for the rental car agencies is consistent across demographic/geographic subgroups.

Prices

With a high degree of consistency in all subgroups, three quarters of the respondents identify Hertz as the car rental company with the highest prices.

CAR RENTAL COMPANY WITH THE HIGHEST PRICE

	U.S. respondents	Other N.A. respondents
Hertz	75.9%	76.3%
Avis	14.1	13.4
National	4.7	4.5
General	1.8	1.1
Budget	1.6	2.5
American International	0.4	0.2
Dollar	0.3	0.9
Alamo	0.3	---
Ajax	0.2	0.4
Thrifty	0.2	0.2
Other	0.5	0.4

More than one-third of the American respondents think that Budget has lower prices than its competitors, while one in four names either Alamo or National as the company with the lowest prices. Again, these results are stable across demographic/geographic groups.

CAR RENTAL COMPANY WITH THE LOWEST PRICES

	U.S. respondents	Other N.A. respondents
Budget	35.0%	35.9%
Alamo	13.6	7.3
National	11.0	17.3
Dollar	8.7	9.9
Thrifty	8.0	7.6
Avis	6.7	7.6
American Int'l	4.9	1.4
Hertz	3.7	5.9
Ajax	3.0	1.7
General	2.0	2.1
Other	3.4	3.3

RENTAL CARS FOR SMOKERS AND NON-SMOKERS

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Almost half of this year's American respondents indicate that they favor the idea of separate rental cars for smokers and non-smokers, while about 40% are indifferent to this idea. Very few respondents oppose the concept of rental cars for smokers and non-smokers.

FEELINGS ABOUT COMPANIES THAT PROVIDE RENTAL CARS FOR SMOKERS AND NON-SMOKERS

	U.S respondents	Other N.A respondents
Strongly in favor	42.2%	39.7%
Somewhat in favor	11.3	8.8
Makes no difference	40.0	44.3
Somewhat opposed	1.7	1.7
Strongly opposed	4.9	5.5

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INTERNATIONAL AIRLINE PASSENGERS ASSOCIATION (IAPA)

Membership Survey Results - 1984/1985

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INTERNATIONAL SURVEY RESULTS

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Published by
International Airline Passengers Association
(Group Publications) Ltd.

DALLAS . LONDON . HONG KONG . PANAMA . ROTTERDAM
BERLIN . PORTUGAL

FOREWORD

This report presents a summary of the data analysis of the 1984 IAPA membership survey. In general, members are high frequency air travellers who make trips for both business and pleasure. they are predominantly male, highly educated, of a professional or business status, and in the middle to high income brackets.

Since the civil aviation industry in the North American continent is markedly different from that in other parts of the world, two questionnaires were compiled; the first was sent to members residing in North America, Canada and Mexico, the second to members in all other parts of the world. The results from the two questionnaires are presented in separated booklets.

Questionnaires were mailed to over 93,000 IAPA members. As of November 1984, 10,059 of the North American questionnaires and 9,072 of the international questionnaires had been returned giving an overall response rate of 20%. Approximately 44% of IAPA membership resides in the Americas.

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INTERNATIONAL SURVEY RESULTS

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GENERAL FINDINGS

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This section of the report presents general findings of the basic demographics of the 1984 IAPA international respondents and their businesses. Where appropriate, comparisons with the 1981 and 1979 survey results are drawn. There were a total of 9,072 respondents to this survey questionnaire.

RESPONDENT DEMOGRAPHICS

Country of Residence

Over half of the 1984 international survey respondents reside in a European country. The total spectrum of countries represented in this study is presented below.

COUNTRY OF RESIDENCE

	1984	1981
Europe	56.3%	65.1%
United Kingdom	41.0	
France	3.7	
Germany	7.1	
Other	4.5	
Middle East/Turkey/ Indian Sub-continent	14.2	10.6
Australia/Asia/Indonesia	11.9	10.3
Central/South America (including Mexico)	10.7	7.7
Africa	4.8	4.7
Canada, U.S.A.	2.0	1.6

Language

Almost half of this year's survey participants claim English as their native language, and most others primarily speak a European language.

NATIVE LANGUAGE

	1984
English	45.0
German	8.0
Spanish	7.0
French	4.7
Other European Language	17.3
Chinese/other Asian language	6.2
An Arabic language	4.7
Other	7.0

Age

The average age for persons participating in the 1984 survey is 44.2 years, which breaks down as follows:

AGE

1984	
Under 20	0.1%
20 - 24	1.1
25 - 29	6.4
30 - 34	12.1
35 - 39	18.4
40 - 44	17.9
45 - 49	15.2
50 - 54	12.7
55 - 59	8.5
60 - 64	5.2
65 +	2.4
Average	44.2 years

	1981	1979
Under 18	0.1%	0.3%
18 - 21	0.5	0.6
22 - 25	3.3	3.1
26 - 35	26.9	26.8
36 - 45	35.3	34.4
46 - 55	23.9	24.6
56 - 65	8.9	9.4
65+	1.1	0.8

Sex

As has been found in previous surveys, almost all the respondents are male.

SEX

	1984	1981	1979
Male	97.0%	97.1%	98.3%
Female	3.0%	2.9%	1.7%

Marital Status

The vast majority of the participants in this year's international survey are married.

MARITAL STATUS
1984

Married	81.4%
Unmarried	18.6%

Education

Similar to previous years' findings, the educational status of the majority of respondents shows no substantial change since the last survey was conducted. In addition, half of the 1984 respondents have pursued graduate studies.

EDUCATION

	1984	1981	1979
1 - 6 years	1.0	0.4	1.1
7 - 9 years	2.8	2.4	3.2
10 - 12 years	19.1	18.4	23.6
1 - 2 years college	7.6	12.6	13.7
3 - 4 years college	18.6	23.6	13.7
Post-graduate	50.8	33.8	26.2

Occupation

As in past years, the individuals who responded to the 1984 International survey are employed in executive, managerial or professional capacities.

OCCUPATION

	1984	1981	1979
Executive manager	56.7%	51.2%	56.7%
Professional	16.9	18.2	36.3
Teacher/professor	1.6	2.3	---
Sales (not retail)	3.8	6.9	1.8
Technical	5.0	6.4	---
Craftsman	0.4	0.3	1.4
Clerical	0.6	0.7	0.2
Government/military	2.0	2.9	---
Retired	1.2	0.7	0.2
Self-employed	8.3	9.3	---
Student	0.3	0.5	---
Homemaker	0.3	0.5	---
Other	2.9	0.1	3.4

Income

The average annual household income for a 1984 international survey respondent is $64,500 versus $58,200 in 1981 and $43,100 in 1979.

ANNUAL HOUSEHOLD INCOME

	1984		1981	1979
Under $20,000	4.3%	Under $20,000	4.7%	12.5%
$20,000 - $34,999	18.4	$20,000 - $35,000	20.0	36.2
$35,000 - $49,999	24.1	$35,001 - $50,000	27.0	24.4
$50,000 - $64,999	20.8	$50,001 - $75,000	24.0	16.3
$65,000 - $79,999	10.9	$75,001 - $100,000	1.9	5.3
$80,000 - $99,999	7.8	$101,001 - $150,000	6.6	5.3
$100,000 - $149,000	5.9	Over 150,000	5.8	---
$150,000 +	5.9			
Average	$64,500	Average	$58,200	$43,100
Percentage change since last study	+10.6%	Percentage change since last study	+35.0%	--

Two thirds (65%) of the 1984 respondents report that only one person contributes to the household income, while the remaining households (35%) have two or more individuals contributing to income. These statistics indicate slightly increasing numbers of households with more than one income contributor since 1979.

NUMBER OF FAMILY MEMBERS CONTRIBUTING TO HOUSEHOLD INCOME

	1984	1981	1979
1	65.0%	70.0%	73.9%
2	28.7	26.0	23.6
3+	6.3	4.0	2.5

PROFILE OF RESPONDENTS' BUSINESSES
****

Category of Business
====================

The 1984 International survey respondents are employed in a wide diversity of industries:

CATEGORY OF BUSINESS

Manufacturing	19.7%
Mining/Oil/Gas	8.3
Professions	8.0
Business services	7.8
Construction	6.3
Wholesale trade	5.6
Finance	4.7
Transportation	4.6
Communications	4.3
Other services	3.6
Insurance	3.1
Government	3.0
Agriculture	2.6
Retail trade	1.7
Real estate	0.7
Other	16.2

Size of respondents' firms

As with the 1981 survey, almost half of this year's respondents are employed in relatively small firms, consisting of fewer than 100 employees.

SIZE OF RESPONDENTS' FIRMS

	1984	1981
1-99	45.5%	40.9%
100-249	12.0	11.3
250-499	8.9	9.4
500-999	7.6	7.7
1,000-4,999	12.7	13.5
5,000+	13.3	17.2

****

AIRLINE EXPERIENCES

****

AIRLINES FLOWN DURING PAST TWO YEARS

From a list of commercial airlines, respondents indicated on which ones they had flown during the past two years. As in the 1981 survey, the international carriers most commonly flown by at least half of all international survey respondents this year are:

- British Airways (73.9%)
- Lufthansa (53.4%)
- Air France (51.8%)
- Swissair (51.6%)

Three carriers - British Airways, Air France and American - have fallen off in reported usage (by at least 5%) since 1981. (See Table 15, page 12 details).

According to country of residence, the most commonly flown international carriers (flown by at least half of the respondents) are:

United Kingdom

British Airways (95.7%)
British Caledonian Airways (56.9%)
Air France (53.7%)
KLM (49.8%)

Middle East

British Airways (73.9%)
Saudi Arabian Airlines (59.2%)
Gulf Air (56.7%)

Germany

Lufthansa (93.8%)
British Airways (76.0%)
Swissair (70.1%)
Pan Am (63.9%)
Air France (57.8%)

France

Air France (95.9%)
British Airways (75.2%)
Swissair (67.7%)
TWA (51.9%)

Asia

Singapore Airlines (79.5%)

Cathay Pacific Airways (75.1%)

JAL (56.5%)

British Airways (56.3%)

Thai Airways International (56.3%)

Malaysian Airline System (52.5%)

Pan Am (50.9%)

Table 15

AIRLINES FLOWN DURING PAST TWO YEARS

	1984	1981
British Airways	* 73.9%	81.8%
Lufthansa	53.4	57.1
Air France	* 51.8	60.2
Swissair	51.6	51.8
KLM	47.7	50.7
Pan Am	45.1	44.7
Eastern	37.6	36.9
Alitalia	32.9	37.1
TWA	32.2	36.0
SAS - Scandinavian Airlines	32.0	35.9
Singapore Airlines	31.1	29.7
British Caledonian Airways	30.5	34.8
American	* 29.7	36.5
United	25.8	29.3
Cathay Pacific Airways	25.6	23.0
Delta	25.5	27.9
Iberia	25.3	25.5
Sabena	21.9	24.5
Thai Airways International	19.3	17.6
JAL (Japan Air Lines)	18.9	19.1
Gulf Air	17.7	17.1
Austrian Airlines	16.2	17.4
Saudi Arabian Airlines	16.1	14.7
Air Canada	15.4	18.8

* = Decrease of at least 5% in reported usage.

Table 15 (Continued)

	1984	1981
Olympic Airways	14.8	14.5
British Midland Airways	13.6	12.3
Northwest	13.4	13.7
Qantas	13.2	14.8
Finnair	13.1	13.8
Malaysian Airline Systems	12.8	11.8
Dan Air	12.2	13.6
Philippine Airlines	11.1	9.8
Air UK	10.8	13.3
Varig	10.5	11.1
Air-India	10.4	11.3
Egypt Air	10.3	9.3
Air Florida	10.2	--
Aer Lingus	9.9	13.7
Continental	9.8	11.6
Western	9.6	13.7
China Airlines	9.5	9.2
UTA French Airlines	9.4	10.5
Garuda Indonesian Airline	9.2	8.5
Alia Royal Jordanian Airline	9.1	8.1
TAP	9.1	10.2
South African Airways	8.3	9.4
Conair Airways	8.3	8.6
Indian Airlines	7.7	7.0
Ansett Airlines of Australia	7.5	7.7
Cyprus Airways	7.3	6.6
Avianca	7.3	6.6

Table 15 (Continued)

	1984	1981
Britannia Airways	6.6	7.5
Canadian Pacific (CP Air)	6.5	6.7
Air New Zealand	6.2	7.1
Middle East Airlines	5.7	8.7
Aeromexico	5.6	7.8
Pakistan International Airlines	5.6	5.8
Kenya Airways	5.5	6.4
Aerolineas Argentinas	5.4	7.9
Aeroflot Soviet Airlines	5.2	6.5
Viasa	5.0	5.7
Air Lanka	5.0	—
Mexicana	4.7	4.8
Nigeria Airways	4.6	4.9
El Al Israel Airlines	4.6	5.7
Air Afrique	4.4	5.9
BWIA International	4.0	3.5
JAI (Yugoslav Airlines)	3.6	4.3
THY (Turkish Airlines)	3.5	2.8
Royal Air Maroc	3.5	4.0
Tunis Air	3.2	3.3
Air Malta	3.2	4.6
Ethiopian Airlines	3.1	3.3
Malev (Hungarian Airlines)	2.9	2.7
Iraqi Airways	2.7	3.2
Air Algeria	2.5	3.2
Air Jamaica	2.5	2.6
LOT (Polish Airlines)	2.3	3.4

Table 15 (Continued)

	1984	1981
People Express	2.3	
Syrian Arab Airlines	2.2	2.1
Brymon Airways	2.1	1.9
Royal Brunei Airlines	2.0	1.5
World Airways	2.0	
Balkan Bulgarian Airlines	2.0	2.2
Libyan Arab Airlines	2.0	2.7
Sudan Airways	1.9	2.6
CSA - Czechoslovak Airline	1.8	2.3
Iran Air	1.6	2.3
Ghana Airways	1.4	2.0
British Island	1.4	3.0
Air Gabon	1.3	1.3
Air Mauritius	1.3	1.6
Caribbean Airways	1.2	1.9
Air Zaire	1.0	1.4
Gibair - Gibraltar Airways	0.6	0.7

IN-FLIGHT SERVICE

1984 respondents' opinions as to which airlines provide the best and worst in-flight service vary widely, according to country of residence. However, Swissair, Lufthansa and Singapore Airlines are consistently rated among the best, while British Airways, Pan Am and Alitalia are named as being among the worst relatively frequently.

However there are clear indications that the rating of any particular airline by members is closely related to experience i.e. airline flown. See page 26 on members ratings on airlines flown.

AIRLINES WITH BEST IN-FLIGHT SERVICE

(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Swissair	(37.9%)	(28.3%)	(51.8%)	(53.1%)	(39.5%)	(21.8%)
Lufthansa	(25.0)	16.4	(31.4)	(66.0)	(20.9)	13.1
Singapore	(25.0)	(20.2)	13.4	(24.7)	(31.2)	(63.6)
British Airways	18.9	(38.4)	9.4	9.3	18.0	7.4
KLM	17.2	17.0	7.3	10.5	(20.4)	6.3
Cathay Pacific	16.1	17.3	12.7	12.7	(20.7)	(50.3)
SAS	15.4	11.3	11.8	15.7	7.6	5.1
Air France	10.6	8.4	(42.2)	8.0	9.4	3.8
Thai Airways	10.6	7.8	9.4	9.3	11.6	(29.6)
British Caledonian	10.5	(26.4)	6.9	4.9	6.1	6.3
JAL	7.3	4.6	6.9	4.6	6.7	(28.3)
TWA	6.6	8.9	15.1	6.5	6.3	1.1
Varig	6.3	3.6	4.5	4.3	0.7	0.6
Pan Am	5.3	4.2	6.5	6.2	5.6	5.7
Qantas Airways	5.2	5.4	1.2	0.9	4.5	8.9

( ) = 20% and greater.

AIRLINES WITH WORST IN-FLIGHT SERVICE

(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany[1]	Middle East	Asia[2]
British Airways	(21.8%)	(27.0%)	(22.9%)	(20.9%)	(25.7%)	(22.3)
Pan Am	(17.6)	(16.0)	(13.0)	(27.0)	(11.6)	(25.8)
Alitalia	(13.1)	(12.7)	(15.2)	(13.8)	(10.2)	6.3
Iberia	8.7	8.1	(13.9)	9.2	4.9	2.6
Air France	8.6	(10.9)	(17.3)	9.2	8.9	7.2
Saudi Arabian	6.6	6.2	3.5	4.3	(24.5)	2.3
Sabena	6.4	7.1	6.9	5.0	3.0	3.3
Eastern	6.3	4.0	6.1	7.4	3.0	4.4
Egyptair	6.2	5.5	8.7	6.0	5.9	4.2

( ) = 10% and greater

[1] Lufthansa (11.0%)

[2] Garuda Indonesian Airways (17.7%); China Airlines (13.5%); Northwest (12.6%)

GROUND SERVICE

As with in-flight service, there is a wide disparity of opinion as to which airlines offer the best and worst ground service. Swissair and Lufthansa receive significant numbers of "best" ratings in most countries under consideration, while British Airways and Alitalia receive relatively high numbers of mentions as airlines providing the worst ground service. More specifically, the results from this question are as follows:

AIRLINES WITH BEST GROUND SERVICE

(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Swissair	(32.7%)	(21.0%)	(47.2%)	(49.0%)	(32.6%)	18.7%
Lufthansa	(25.3)	16.2	(28.2)	(69.9)	(20.3)	15.2
KLM	9.5	19.3	11.6	12.6	(21.1)	9.4
British Airways	18.2	(37.7)	7.9	6.3	(22.8)	8.4
Singapore	17.0	12.6	9.3	15.6	(20.1)	(49.4)
SAS	13.4	9.0	9.7	13.6	6.7	5.2
Cathay Pacific	9.4	10.1	3.7	4.3	10.7	(40.7)
British Caledonian	8.0	(20.3)	6.0	3.3	5.4	5.6
TWA	7.9	10.5	(22.2)	5.3	8.8	2.1
Pan Am	7.2	6.1	6.0	6.6	9.1	7.3
Air France	7.0	4.7	(37.0)	4.6	8.2	3.5
JAL	5.8	3.5	6.0	4.3	5.1	(27.2)
Eastern	5.6	2.1	3.7	2.3	3.8	1.9

( ) = 20% and greater

AIRLINES WITH WORST GROUND SERVICE
(Includes airlines with at least 5.0% total mentions)

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East 1	Asia 2
British Airways	(18.0%)	(24.5%)	(18.0%)	(20.5%)	(15.2%)	(13.8%)
Alitalia	(14.0)	(13.1)	(19.6)	(14.4)	9.9	4.4
Pan Am	9.8	9.0	7.9	(16.7)	6.2	(11.7)
Iberia	8.8	8.8	(17.5)	(12.5)	4.0	2.3
Saudi Arabian	8.5	7.7	2.6	7.2	(33.6)	2.6
Air France	7.4	8.3	(17.5)	6.8	7.2	3.7
Egyptair	6.1	5.0	7.9	2.3	(13.3)	3.4

(   ) = 10% and greater

1 Gulf Air (12.5%)

2 Garuda Indonesian Airways (19.1%); China Airlines (13.1%); Philippine Airlines (12.0%); Malaysian Airline System (10.2%)

Again members ratings depend very much on experience - see page 26

MOST PREFERRED AIRLINES OVERALL

Respondents were asked to indicate up to four airlines they most prefer to fly. Swissair is the most frequently mentioned carrier, with 40.1 per cent naming it. Both Swissair and Lufthansa receive more frequent mention among first and business class travellers than among persons flying on an economy or discount basis. In total, the following are the most popular carriers (receiving at least 10% mention in the total sample).

MOST PREFERRED AIRLINES
(Up to four choices)

		Class flown in			
Preferred Airline	Total %	1st	Business	Economy	Discount
Swissair	40.1%	47.7%	43.9%	33.0%	33.9%
Lufthansa	27.5	33.2	30.7	23.2	20.4
Singapore Airlines	26.4	31.8	25.6	22.6	31.3
British Airways	21.8	18.7	22.4	23.7	20.0
KLM	20.4	18.3	23.0	18.1	18.0
Cathay Pacific	16.2	19.7	15.5	14.2	19.7
SAS	16.1	7.2	25.5	9.7	11.6
British Caledonian	10.4	11.1	10.6	10.3	9.8

Airline preference varies according to members' country of residence. In each country, the most preferred airlines (mentioned by at least 20% of the residents) are as follows:

MOST PREFERRED AIRLINES
(By country of residence)

United Kingdom	France	Germany	Middle East	Asia
British Airways (42.2%)	Swissair (55.6%)	Lufthansa (64.8%)	Swissair (40.2%)	Singapore (63.3%)
Swissair (29.0)	Air France (44.4)	Swissair (58.3)	Singapore (33.5)	Cathay Pacific (52.3)
British Caledonian (26.0)	Lufthansa (28.4)	Singapore (25.9)	Lufthansa (24.2)	JAL (29.2)
Singapore (20.7)	Singapore (21.0)		British Airways (22.1)	Thai Airways (27.1)
			KLM (22.0)	Swissair (27.1)
			Cathay Pacific (20.1)	

Respondents were also asked to indicate which one airline they most prefer to fly. Results are similar to those obtained in 1981; again, Swissair is the most preferred airline. SAS has gained somewhat in popularity since 1981.

SINGLE MOST PREFERRED AIRLINE

(Top ten)

	1984	1981	1979
Swissair	19.5%	21.7%	14.9%
Singapore Airlines	10.7	13.7	11.7
British Airways	8.5	7.8	18.7
Lufthansa	7.4	8.1	8.6
SAS	7.2	2.7	2.3
Cathay Pacific	5.8	4.2	1.6
KLM	5.7	5.1	3.8
British Caledonian	3.9	3.4	5.3
Air France	2.4	3.0	2.1
Thai Airways	2.3	--	--

In terms of class flown, first class passengers prefer Swissair even more strongly than other respondents and SAS makes an especially strong showing among business class travellers.

SINGLE MOST PREFERRED AIRLINE
(Top ten)

		Class Flown			
Preferred Airline	Total %	First	Business	Economy	Discount
Swissair	19.5%	(24.9%)	19.2%	17.8%	16.1%
Singapore Airlines	10.7	13.4	8.9	9.8	15.1
British Airways	8.5	6.1	8.8	10.0	7.8
Lufthansa	7.4	9.5	7.4	6.9	6.0
SAS	7.2	1.9	(12.7)	3.5	4.7
Cathay Pacific	5.8	6.6	5.3	5.9	7.3
KLM	5.7	4.5	7.2	4.7	5.0
British Caledonian	3.9	4.0	4.1	3.7	4.1
Air France	2.4	2.3	2.3	2.4	2.9
Thai Airways	2.3	0.7	2.6	1.9	3.9

( ) = At least 5.0 above total %

By country of residence the most preferred airline is as follows:

SINGLE MOST PREFERRED AIRLINE
(With 5% or more total mentions)

United Kingdom	France	Germany	Middle East	Asia
British Airways (23.7%)	Swissair (28.9%)	Lufthansa (41.3%)	Swissair (21.2%)	Singapore (29.9%)
Swissair (13.0)	Air France (24.3)	Swissair (21.1)	Singapore (17.1)	Cathay Pacific (22.0)
British Caledonian (11.0)	Singapore (8.4)	Singapore (9.3)	British Airways (7.9)	Swissair (9.0)
Singapore (8.3)	Lufthansa (6.7)		Cathay (7.9)	JAL (7.9)
Cathay Pacific (6.9)	TWA (5.4)		Lufthansa (5.8)	Thai (7.1)
			KLM (5.5)	

AIRLINES THAT WOULD BE AVOIDED

This year, respondents were asked to name up to three airlines that they would avoid. Similar to findings for 1981 and 1979, four airlines come up most frequently:

- British Airways
- Pan Am
- Alitalia
- Aeroflot

More specifically, the top ten ranking airlines to be avoided are as follows:

AIRLINES TO BE AVOIDED
(Top ten)

	1984 (1)	1981 (2)	1979 (2)
British Airways	15.8%	14.6%	23.7%
Pan Am	12.6	8.5	7.2
Alitalia	12.1	6.6	6.7
Aeroflot	11.1	9.9	9.0
Saudi Arabian Airlines	8.1	3.1	3.4
Egypt Air	7.6	2.6	2.5
Iberia	6.9	2.2	3.3
Nigeria Airways	6.0	3.1	3.7
El Al Israel Airlines/ Libyan Arab Airlines	5.8	--	--
Air France	5.6	2.0	2.3

(1) Multiple responses
(2) One response only

No major differences regarding the airlines to be avoided emerge when analysed by class flown. However, members ratings are greatly influenced by airline experiences - see page 25.

By country, the ten airlines that would most often be avoided are as follows:

AIRLINES TO BE AVOIDED
(Top ten)

United Kingdom	France	Germany	Middle East	Asia
British Airways (19.3%)	British Airways (17.9%)	Pan Am (19.2%)	Saudi Arabia (26.6%)	Garuda Indonesian (20.2%)
Pan Am (13.2)	Aeroflot (15.6)	British Airways (17.9)	British Airways (18.1)	British Airways (16.0)
Alitalia (10.9)	Alitalia (12.9)	Aeroflot (16.5)	Egypt Air (17.3)	Pan Am (14.6)
Nigeria Airways (9.7)	Air France (11.2)	Alitalia (13.1)	Pakistan (9.7)	Aeroflot (12.4)
Aeroflot (9.4)	Iberia (10.3)	Iberia (8.6)	Pan Am (9.3)	Air India (11.3)
Saudi Arabian (8.5)	Pan Am (8.9)	Air France (6.5)	Alitalia (9.2)	China Airlines (10.6)
Egypt Air (7.2)	Egypt Air (7.1)	Lufthansa (6.5)	El Al Libyan (7.8)	Philippines (8.5)
Iberia (6.7)	El Al Libyan (5.8)	El Al Libyan (6.2)	Alia-Royal (7.4)	Indian (7.3)
El Al Libyan (6.2)	TWA (5.8)	Pakistan Int'l (5.2)	Syrian Arab (6.3)	Egyptian (5.9)
Air France (6.2)	Saudi Arabian (5.2)	Saudi Arabian (4.8)	Olympic Air (6.1)	Alitalia (5.6)

Ratings of airlines flown over the past two years

An evaluation analysis of airline preference and avoidance in terms of experience of the nominated airline indicates two over-riding trends:

> Respondents were unlikely to nominate an airline with which they have not flown as either one they would avoid or prefer.
>
> The likeihood of nominating an airline with which they have flown as one they would avoid or prefer increases with experience of the airline.

So, when airline preference and avoidance is taken in conjunction with actual experience of the airline nominated, the ranking of favourability can change significantly from that shown on the previous pages where experience of an airline is not a criterion.

Table 16 which follows rates airlines with whom 300+ respondents have flown and should be read:

Column 1	% flown % of total respondents claiming to have flown (have experience of) the airline
Columns 2-3	% of those respondents who have flown the airline who would prefer or avoid that airline
Column 4	The net difference between those who have flown and prefer (+) and those who have flown and would avoid (-) an airline. This column provides a preference ranking between airlines.

Thus 31.1% of all respondents have flown Singapore Airlines, of whom 69.7% expressed a preference and 1.6% would avoid: providing a nett +68.1% preference. Further, of the 5.2% of all respondents who have flown Aeroflot, 1.1% expressed a preference and 60.7% would avoid: providing a nett -59.6% avoidance.

Rated in this manner, the preference for Singapore Airlines is statistically "on par" with Swissair; Cathay Pacific is just ahead of Lufthansa and SAS; Thai International and JAL leap into the top ten, closely followed by Air New Zealand. At the bottom of the table Nigeria Airways and Aeroflot emerge as the airlines with the highest avoidance (- negative) rating.

Table 16

RESPONDENTS RATING OF AIRLINES FLOWN OVER THE PAST 2 YEARS

Airline	% Flown 1984	% Based on those airlines flown Preferred	Avoid	Difference
Singapore Airlines	31.1	69.7	1.6	+68.1
Swissair	51.6	69.0	1.0	+68.0
Cathay Pacific	25.6	54.2	1.8	+52.4
SAS	32.0	45.8	2.4	+43.4
Lufthansa	53.4	46.2	3.3	+42.9
Thai International	19.3	40.3	2.0	+38.3
KLM	47.7	37.5	3.0	+34.5
JAL	18.9	32.9	2.8	+30.1
Qantas	13.2	34.4	4.5	+29.9
British Caledonian	30.5	31.1	2.9	+28.2
Air New Zealand	6.2	29.5	2.2	+27.3
South African Airways	8.3	25.8	3.4	+22.4
Austrian Airlines	16.2	17.3	1.8	+15.5
Delta	25.5	16.9	2.2	+14.7
Finnair	13.1	15.6	1.4	+14.2
TWA	32.2	21.9	8.3	+13.6
Malaysian Airline System	12.8	17.9	5.3	+12.6
Canadian Pacific	6.5	14.6	3.6	+11.0
American	29.7	13.0	2.8	+10.2
Air Canada	15.4	13.8	3.9	+ 9.9
British Airways	73.9	28.2	18.8	+ 9.6
Middle East Airlines	5.7	15.6	6.9	+ 8.7

Table 16 (continued)

Airport	% Flown 1984	% Based on those airlines flown Preferred (1 of 4)	Avoid (1 of 3)	Difference
Air France	51.8	17.3	9.1	+ 8.2
Gulf Air	17.7	16.6	8.7	+ 7.9
British Midland Airways	13.6	8.6	1.9	+ 6.7
United	25.8	9.1	3.1	+ 6.0
El Al	4.6	18.2	14.0	+ 4.2
Eastern	37.6	11.2	7.1	+ 4.1
Philippine Airlines	11.1	14.6	11.0	+ 3.6
Northwest	13.4	11.7	8.6	+ 3.1
Air Lanka	5.0	11.8	9.0	+ 2.8
Ansett Airlines of Australia	7.5	3.1	1.3	+ 1.8
Britannia Airways	6.6	4.0	3.6	+ 0.4
UTA French Airlines	9.4	9.4	9.2	+ 0.2
Western	9.6	2.9	3.2	- 0.3
Aerolinias Argentinas	5.4	11.4	12.3	- 0.9
Continental	9.8	5.0	6.1	- 1.1
BWIA International	4.0	11.9	13.0	- 1.1
Air Lingus	9.9	6.1	7.8	- 1.7
Air Florida	10.2	3.8	10.5	- 6.7
Pan Am	45.1	15.3	22.1	- 6.8
Air India	10.4	12.0	19.2	- 7.2
Dan Air	12.2	2.6	10.1	- 7.5
Mexicana	4.7	2.8	10.5	- 7.7
Alia - Royal Jordanian Airline	9.1	5.2	13.6	- 8.4

Table 16 (Continued)

Airline	% Flown	% Based on airlines flown		
	1984	Preferred (1 of 4)	Avoid (1 of 3)	Difference
Cyprus Airways	7.3	3.2	12.0	- 8.8
China Airlines	9.5	6.1	15.2	- 9.1
Sabena	21.9	6.1	17.0	-10.9
Olympic Airways	14.8	4.3	15.4	-11.1
TAP	9.1	4.5	18.4	-13.9
Iberia	25.3	7.0	21.2	-14.2
Royal Air Maroc	3.5	1.0	16.1	-15.1
Aeromexico	5.6	1.1	16.7	-15.6
Air Afrique	4.4	2.4	18.5	-16.1
Avianca	7.3	5.5	24.3	-18.8
Indian Airlines	7.7	0.9	23.2	-22.3
Viasa	5.0	7.2	30.5	-23.3
Alitalia	32.9	3.7	28.3	-24.6
Pakistan International Airlines	5.6	5.2	32.4	-27.2
Saudi Arabian Airlines	16.1	6.2	34.6	-28.4
Garuda Indonesian Airline	9.2	2.3	32.8	-30.5
THY (Turkish Airlines)	3.5	1.4	37.0	-35.6
Egypt Air	10.3	1.6	45.1	-43.5
Aeroflot	5.2	1.1	60.7	-59.6
Nigeria Airways	4.6	2.2	69.3	-67.1

ROUND TRIP FREQUENCY DURING PAST TWO YEARS
****

Respondents were asked to indicate how many round trips for business and pleasure they had taken within and outside their own country on a commercial airline during the past two years. In addition, they indicated how many of these trips included an overnight stay. 1984 international survey respondents are more likely to take a trip that takes them out of their own country rather than to take a trip that does not. not. In addition most trips do include an overnight stay as shown below.

ROUND TRIP FREQUENCY DURING PAST TWO YEARS

	1984	1981*	1979*
Business:		14.3	16.6
Within country of residence (total)	14.2	--	--
Within country of residence Including overnight stay	9.4	--	--
Outside country of residence (total)	19.2	--	--
Outside country of residence Including overnight stay	16.7	--	--
Pleasure:		2.5	1.8
Within country of residence (total)	2.6	--	--
Within country of residence Including overnight stay	2.0	--	--
Outside country of residence (total)	4.2	--	--
Outside country of residence including overnight stay	3.8	--	--

*Only total figures for business and pleasure round trips available for these years.

The following groups of respondents are the heaviest business travellers:

- Men
- First class flyers
- Business class flyers
- Individuals who have flown on the major international airlines during the past two years.

Women tend to travel for pleasure more frequently than do men, while pleasure travel is relatively consistent across other demographic/ geographical subgroups.

CLASS FLOWN MOST OFTEN

The percentage of international survey respondents flying business class more frequently than any other has increased substantially during the past two years, largely at the expense of full fare economy class. However, women are still far more apt to fly economy than business class.

CLASS FLOWN MOST OFTEN

	Today			Two Years Ago		
	Total	Male	Female	Total	Male	Female
First class	12.6%	12.7%	8.1%	15.1%	15.3%	9.0%
Business Class	40.9	41.5	23.6	24.8	25.2	12.3
Economy (Full Fare)	30.9	30.3	48.0	45.1	44.8	54.9
Discount	15.1	15.0	18.3	14.1	14.0	20.5
Holiday charter	0.5	0.5	2.0	0.8	0.8	3.3

CHOOSING A FLIGHT

How Flight is Selected

For both business and pleasure travel, the ultimate choice of flight almost always rests with the passenger him/herself. However, in most instances, the passenger is aided in the decision process by either a travel agent, an airline guide, or an airline brochure.

HOW FLIGHT IS USUALLY SELECTED

	Business Trip	Pleasure Trip
Choose flight myself after consulting with travel agent	36.9%	52.3%
Choose flight myself after referring to airline guide	25.5	18.9
Choose flight myself after referring to airline brochure	14.5	16.7
Choose flight myself after consulting with secretary	6.5	2.1
Choose flight myself after consulting with corporate travel department	4.9	2.2
Travel agent chooses flight	3.7	4.9
Secretary chooses flight	3.6	0.7
Corporate travel department chooses flight	3.5	0.3
Other	1.4	1.9

Most Influential Factor in Choice of a Flight

Schedule is definitely the most important criterion when respondents are choosing a flight that will last for less than two hours. For flights that are more substantial in length (2-5 hours), schedule is still a prime consideration; however, the airline shares equal importance. For flights of more than five hours, the airline becomes the single most important selection factor. Regardless of the flight duration, fare and aeroplane are secondary considerations, although the importance of each increases somewhat as the length of the flight increases.

The increasing importance of airline in choice of flight must however be considered in the light of members ratings of airlines flown and not flown. This indicates that the influence of "airline" in choice of flight will in turn, be very much influenced by the airlines with which the member has previous experience.

MOST INFLUENTIAL FACTOR IN CHOICE OF A FLIGHT

	Length of Flight		
	Under 2 Hours	2-5 Hours	Over 5 Hours
Schedule	70.1%	43.0%	19.3%
Airline	15.5	36.2	53.0
Fare	11.4	13.7	16.5
Aeroplane	2.5	6.6	10.2
Other	0.5	0.6	1.0

The Most Influential Factors in Choice of an Airline

For flights lasting less than two hours, respondents' prime concerns relate to schedule. The factors most frequently included are;

- Convenient schedule (67.9%)
- Frequency of flights (33.8%)
- On-time performance (30.7%)

For longer flights, convenient schedule remains the most critical concern, while frequency of flights and on-time performance diminish in proportion and quality of in-flight service and past experience with the airline take on comparatively high levels of importance.

"PLEASE INDICATE WHICH THREE FACTORS ARE MOST IMPORTANT TO YOU WHEN CHOOSING AN AIRLINE"

	Length of Flight					
	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
Convenient schedule	67.8%	1	59.9%	1	44.2%	1
Frequency of flight	33.8	2	13.3	11	6.5	11
On-time performance	30.7	3	22.0	4	16.1	10
Past experience	27.8	4	28.4	3	29.5	3
Low fares	18.0	5	19.1	6	22.0	6
Safety record	17.1	6	18.7	7	22.3	5
Attitude of Personnel	16.8	7	21.4	5	23.6	4
Quality of in-flight service	15.7	8	29.5	2	38.5	2
Aircraft type	10.4	9	14.2	9	21.1	7
Availability of business class	7.8	10	14.1	10	16.2	9
Quality of ground service	6.8	11	5.8	12	4.8	13
National flag carrier	6.6	12	4.9	13	5.3	12
Quality of food and drinks	6.5	13	15.1	8	20.5	8
Frequent flyers programme	3.2	15	3.8	14	4.3	14
Others	1.0	15	0.9	15	1.1	15

Airline Service

At least a quarter of the 1984 international survey respondents rate the following airline services as one of the three most important:

* Fast check-in (47.3%)
* Flight attendant attitude/behaviour (45.5%)
* Leg room (45.1%)
* Pre-reserved seat assignment (39.3%)
* Quick baggage retrieval (33.3%)
* Seat width (25.5%)

However, at least a quarter of the respondents also indicate that these important services generally need improvement, with the level of need for improvement expressed being especially high for fast check-in (53.3%), legroom (52.6%) and quick baggage retrieval (64.9%).

EVALUATIONS OF AIRLINE SERVICES

	Among the 3 Most Important Services	Needs Improvement
Fast Check-in	47.3%	53.5%
Flight Attendant Attitude/Behaviour	45.5	31.7
Leg-room	45.1	52.6 (2)
Pre-reserved Seat Assignment	39.3	26.8
Quick Baggage Retrieval	33.3	64.9
Seat Width	25.5	38.0 (3)
Food Service	18.9	24.4
Special First-class and Business class Lounges	16.9 (1)	14.1 (4)
Carry-on Baggage Compartments	11.1	29.8
Adequate Waiting Areas	6.4	24.9
Beverage Service	4.4	8.5
In-flight Audio/Video Entertainment	4.3	10.3
Magazines and Newspapers	2.7	11.8

(1) 40.3% First class flyers; 24.9% Business class flyers; 3.8% Economy class flyers; 2.1 Discount class flyers

(2) 36.0% First class flyers; 50.0% Business class flyers; 57.2% Economy class flyers; 62.1% Discount class flyers

(3) 27.0% First class flyers; 37.4% Business class flyers; 40.0% Economy class flyers; 40.1% Discount class flyers

(4) 21.5% First class flyers; 23.6% Business class flyers; 4.1% Economy class flyers; 1.4% Discount class flyers

ATTITUDES TOWARD AIRFARES
****

The vast majority of the respondents consider current airfares to be "expensive", with equal proportions describing them as "very expensive" (39.7%) and "somewhat expensive" (41.7%). This finding is generally true regardless of demographic differences, with just one noteworthy exception; one-third of the Asian respondents describe airfares as "about what you would expect".

HOW EXPENSIVE CONSIDER AIRFARES

	Total	Asia
Very expensive	39.7%	18.1%
Somewhat	41.7	46.5
About what you would expect	16.9	31.4
Somewhat inexpensive	1.5	3.0
Very expensive	0.2	1.0

With regard to regulation of air fares, most IAPA travellers are aware of the differences between U.S. and European policies. Furthermore, the vast majority of the respondents believe that deregulation would benefit the European traveller.

	Yes	No
Aware of differences between U.S. and European pricing regulations?	82.1%	17.9%
Think that abolition of pricing regulations would benefit European business traveller?	86.0	14.0

****

AIRCRAFT PREFERENCES

****

AIRCRAFT FLOWN ON DURING PAST TWO YEARS
****

Respondents were provided with a list of various aircraft and indicated on which they had flown during the past two years. Similar to findings in 1981 and 1979, the Boeing 747 is the most frequently flown aircraft, with the Boeing 727, McDonnell Douglas DC-10, and Boeing 737 trailing closely behind.

AIRCRAFT FLOWN ON DURING PAST TWO YEARS

	1984	1981	1979*
747	91.3%	90.5%	91.6%
727	80.0	80.3	89.5
DC-10	79.2	80.6	77.6
737	78.8	70.1	80.3
A300	69.2	64.0	64.8
DC-9	65.9	68.7	83.1
L1011	51.6	51.5	54.2
BAC 1-11	43.3	--	--
A310	38.8	--	--
DC-8	38.4	55.1	71.8
F-28	36.0	--	--
DC-9/80	27.7	--	--
757	19.5	--	--
767	11.2	--	--
Concorde	10.0	12.3	15.6

* No time limit specified

IMPORTANT FACTORS IN PREFERENCE OF AN AIRCRAFT

For a flight of less than two hours duration, almost half of the 1984 international survey respondents indicate that safety (47.5%) and overall comfort (44.7%) are among the most important criteria in their preference of an aircraft. In addition, one-third name leg-room (37.1%) and past experience with this type of aircraft (31.6%) as important factors. For longer flights, comfort, leg-room and spaciousness take on increased importance, with safety becoming a slightly lesser consideration and past experience becoming a relatively low priority. Women are markedly more concerned with safety than are men.

IMPORTANT FACTORS IN PREFERENCE TO AN AIRCRAFT

	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
Safety	47.5%(1)	1	43.1%(2)	3	42.8%(3)	4
Overall comfort	44.7	2	48.4	1	50.8	1
Legroom	37.1	3	43.5	2	44.3	3
Past experience	31.6	4	25.4	5	23.0	7
Spaciousness	29.3	5	38.5	4	44.7	2
Noise Level	23.6	6	23.5	7	22.3	8
Baggage Storage	19.1	7	11.4	8	8.5	10
Seat Width	18.1	8	24.1	6	25.6	5
Reputation	13.8	9	10.2	9	9.4	9
Manufacturer	4.9	10	4.5	10	4.3	10
Overall Size	4.5	11	4.1	11	4.1	11

(1) Males 46.9% vs. females 63.9%

(2) Males 42.5% vs. females 59.8%

(3) Males 42.2% vs. females 57.5%

MOST PREFERRED AIRCRAFT

For short flights (lasting under 2 hours) the Airbus Industrie A300 is the most commonly preferred type of aircraft, with a quarter of all respondents naming it. For longer flights, especially those lasting more than 5 hours, the Boeing 747 is by far the most popular aircraft.

MOST PREFERRED AIRCRAFT AMONG 1984 SURVEY INTERNATIONAL SURVEY RESPONDENTS

	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
A300	25.1%	1	17.5%	2	2.0%	5
737	14.2	2	2.9	9	0.6	9
727	10.9	3	3.6	7	0.4	10
A310	10.3	4	8.7	5	1.0	7
747	7.9	5	31.3	1	71.2	1
DC-9	7.0	6	1.5	11	0.1	11
757	5.6	7	3.6	7	1.4	6
DC9/80	5.1	8	1.5	11	0.1	11
L-1011	3.7	9	10.9	3	6.3	4
BAC 1-11	3.1	10	0.7	13	0.1	11
DC-10	2.4	11	10.4	4	9.2	2
F-28	1.8	12	0.2	15	0.1	11
767	1.8	13	2.3	10	0.8	8
Concorde	0.7	14	4.3	6	6.6	3
DC-8	0.5	15	0.6	14	0.1	11

AIRCRAFT THAT WOULD BE AVOIDED
****

For flights lasting up to five hours, respondents most commonly avoid the BAC 1-11 and the F-28. On flights that last more than five hours, survey participants would seek to avoid the McDonnell Douglas DC-10 and the DC-8.

AIRCRAFT THAT WOULD BE AVOIDED BY 1984 IAPA SURVEY RESPONDENTS

	Flight Duration					
	Under 2 Hours		2-5 Hours		Over 5 Hours	
	%	Rank	%	Rank	%	Rank
BAC 1-11	22.9%	1	15.7%	1	9.0%	4
F-28	19.5	2	14.6	2	12.5	3
DC-10	10.1	3	14.2	3	24.1	1
DC-8	8.3	4	13.2	4	18.6	2
727	7.3	5	10.8	5	8.6	5
737	7.2	6	9.8	6	5.1	7
DC9	7.2	7	9.2	7	6.2	6
747	7.0	8	2.5	9	2.8	10
Concorde	3.7	9	1.6	11	2.1	11
A300	3.1	10	3.4	8	3.7	9
L-1011	1.6	11	2.3	10	4.8	8
757	0.8	12	1.0	12	0.7	13
A310	0.6	13	0.8	13	0.9	12
DC-9/80	0.4	14	0.7	14	0.6	14
767	0.1	15	0.1	15	0.2	15

PERCEPTIONS OF COMMERCIAL AIRCRAFT MANUFACTURERS

Respondents were asked to indicate which of the five major aircraft manufacturers they feel produces the best commercial aircraft. Overall, an overwhelming majority think of Boeing as the best commercial aircraft manufacturer (up substantially from its number 1 percentage rating in 1981). In France and Germany, Airbus Industrie has a reputation that is equally as positive as Boeing's.

AIRCRAFT MANUFACTURER PERCEIVED TO PRODUCE THE BEST COMMERCIAL AIRCRAFT

	1981 Total	1984 Total	United Kingdom	France	Germany	Middle East	Asia
Boeing	59.8%	68.4%	67.9%	47.2%	44.9%	70.1%	84.7%
Airbus Industrie	16.2	16.6	15.4	45.5	47.8	11.8	8.4
McDonnell Douglas	11.3	7.9	4.3	4.3	4.8	4.6	3.9
Lockheed	8.9	4.4	6.0	0.9	1.8	10.0	2.3
British Aerospace	3.6	2.3	6.0	0.4	0.4	3.1	0.5
Other	1.4	0.5	0.3	1.7	0.4	0.4	0.2

SMOKING ON THE AIRCRAFT

****

With consistent findings in all subgroups, 71.2% of the 1984 respondents usually sit in the non-smoking section of the plane, while 28.8% sit in the smoking area. Regarding a potential smoking ban against smoking on short flights (less than two hours), a majority (57.9%) would favour such a ruling, while one in five (21.1%) is indifferent and an additional one-fifth (20.9%) are opposed. Half (51.4%) of those responding would favour a smoking ban on longer flights (two hours or more), while almost one-fifth (17.9%) are indifferent and 30.8% would oppose such a restriction. Again, these findings hold true in all subgroups.

SECTION OF AEROPLANE 1984 INTERNATIONAL SURVEY RESPONDENTS USUALLY OCCUPY

Smoking	28.8%
Non-Smoking	71.2

REACTIONS TO PROPOSED CIGARETTE SMOKING BAN

	On flights less than two hours	On flights of two hours of more
Strongly in Favour	45.4%	33.5%
Somewhat in Favour	12.5	17.9
Makes no Difference	21.1	17.9
Somewhat Opposed	6.9	7.5
Strongly Opposed	14.0	23.3

****

AIRPORT FACILITIES

****

AIRPORTS FLOWN INTO DURING PAST TWO YEARS

The airports most frequently used by International passengers during the past two years (i.e., those mentioned by at least 50% of the 1984 international survey respondents) are:

* London (Heathrow) (77.9%)
* Amsterdam (53.0%)
* New York (Kennedy) (52.5%)
* Paris (de Gaulle) (52.2%)
* Frankfurt (51.6%) (see Table 16 for details)

By country of residence, the most commonly frequented airports (flown into by at least half of the respondents) are:

United Kingdom

London (Heathrow) (96.7%)
London (Gatwick) (76.5%)
Amsterdam (60.8%)
Paris (de Gaulle) (58.2%)

Germany

Frankfurt (93.8%)
London (Heathrow) (76.2%)
Zurich (66.9%)
New York (Kennedy) (62.8%)
Paris (de Gaulle) (59.8%)
Amsterdam (57.5%)

France

Paris (de Gaulle) (94.0%)
Paris (Orly) (85.0%)
London (Heathrow) (82.4%)
Geneva (66.7%)
New York (Kennedy) (64.4%)
Frankfurt (59.9%)
Amsterdam (52.4%)
Zurich (51.7%)

Middle East

London (Heathrow) (82.3%)

Asia

Hong Kong (85.5%)
Singapore (74.5%)
London (Heathrow) (61.0%)
Los Angeles (50.0%)

Table 17

AIRPORTS FLOWN INTO DURING PAST TWO YEARS BY 1984 IAPA SURVEY RESPONDENTS

London (Heathrow)	77.9%
Amsterdam	53.0
New York (Kennedy)	52.5
Paris (de Gaulle)	52.2
Frankfurt	51.6
London (Gatwick)	46.4
Zurich	42.5
Geneva	38.1
Paris (Orly)	33.4
Los Angeles	31.6
Hong Kong	31.0
Singapore	31.0
New York (La Guardia)	28.8
Miami	28.4
Copenhagen	28.2
Rome	27.8
Bangkok	27.5
Brussels	27.5
Athens	26.6
San Francisco	24.9
Chicago (O'Hare)	22.8
Madrid	22.1
Tokyo	20.9
Milan (Linate)	20.4
Abu Dhabi	18.6
Stockholm	18.3
Boston	16.4
Cairo	15.7

Table 17 (Continued)

Bombay	15.3
Dallas/Fort Worth	15.2
Houston (International)	14.8
Washington, D.C.	14.8
Oslo	13.5
Honolulu	13.5
Sydney	12.2
Lisbon	12.1
Toronto	12.1
Montreal	10.9
Las Vegas	10.2
Rio De Janeiro	10.1
Newark	9.8
Berlin (Tegel)	9.5
Dublin	9.4
Johannesburg	9.2
Glasgow	9.2
Orlando	8.9
Denver	8.5
Mexico City	8.4
New Orleans	8.3
Anchorage	8.1
Seoul	8.1
Rotterdam	7.9
Osaka	7.8
Seattle/Tacoma	7.5
Bogota	7.0
Tel Aviv	6.4
Panama	6.2
Minneapolis/St. Paul	6.2

Table 17 (Continued)

Lagos	6.1
Vancouver	6.0
Philadelphia	5.9
Detroit	5.7
St. Louis	4.8
Perth	4.6
Orlando	4.6
Santiago	4.3
Pittsburgh	3.5
Others	57.4

To further clarify the frequency with which various airports have been used, 1984 respondents were asked to indicate which they have used most frequently. The findings are similar to those indicated above, as indicated in Table 18.

Table 18

AIRPORTS MOST FREQUENTLY USED BY COUNTRY OF RESIDENCE (10% or more mentions)

Total	U.K.	France	Germany	Middle East	Asia
London 57.3% (Heathrow)	London 93.9% (Heathrow)	Paris 81.8% (de Gualle)	Frankfurt 83.8%	London 65.4% (Heathrow)	Hong Kong 62.4%
New York 26.8 (Kennedy)	London 47.2 (Gatwick)	London 44.3 (Heathrow)	London 45.5 (Heathrow)	New York 26.9 (Kennedy)	Singapore 54.3
Amsterdam 25.3	Amsterdam 31.9	Paris 36.8 (Orly)	Zurich 37.9	Amsterdam (23.1)	Tokyo 40.5
Frankfurt 23.1	Paris 23.0 (de Gaulle)	New York 33.6	New York 35.8	Frankfurt 20.0	Bangkok 31.7
Paris 19.6 (de Gualle)	New York (Kennedy) 20.9	Geneva 24.5	Amsterdam 21.2	Paris 17.7 (de Gaulle)	London (Heathrow) 28.6
Zurich 18.3	Frankfurt 13.3	Frankfurt 22.9	Paris 17.9 (de Gualle)	Zurich 17.2	New York (Kennedy) 17.5
London 16.8 (Gatwick)	Zurich 10.4	Amsterdam 16.2	Singapore 10.0	Singapore 12.8	Los Angeles 16.5
Singapore 14.7	Geneva 10.2	Zurich 16.2		Abu Dhabi 11.1	San Francisco 15.4
Copenhagen 11.7					Amsterdam 11.7
Hong Kong 11.7					Frankfurt 10.2

EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

1984 International survey respondents indicated from a list which airport services and facilities are most important to them in their evaluation of an airport. In addition, they indicated which items they feel generally need improvement. Results are stable across demographic/geographic subgroups.

The factors that are most important to the airport evaluation process (selected by at least 20% of those responding) are:

* Quick baggage claim (63.1%)
* Quick and easy check-in (44.1%)
* Rapid customs clearance (40.6%)
* Ease of changing planes (31.1%)
* Short walking distance (27.6%)
* Comfortable waiting areas/lounges (20.5%)

By far, the most important evaluation criterion for an airport is quick baggage claim, as 63.1% of those responding include this in the top three factors. In addition, this is by far the factor most commonly cited as needing improvement, as 69.7% of the respondents indicate that this is so. (See Table 18 for details).

Between 35% and 55% of the respondents feel that each of the other airport factors generally needs improvement.

Table 19

1984 SURVEY RESPONDENTS' EVALUATIONS OF AIRPORT SERVICES AND FACILITIES

	Most important factors in airport evaluation	Needs improvement
Quick baggage claim	63.1%	69.7%
Quick and easy check-in	44.1	50.3
Rapid customs clearance	40.6	56.1
Ease of changing planes	31.1	36.8
Short walking distance	27.6	42.0
Comfortable waiting areas/lounges	20.5	38.9
Jetways (loading bridges)	14.1	11.6
Good security	11.6	14.5
Cleanliness	11.3	31.4
Moving walkways	10.9	22.5
Internatonal signs/directions/information	6.2	13.5
Duty-free shops	5.9	9.3
Availability of ground transportation	5.2	13.6
Frequent transportation between terminals	3.2	15.6
Good restaurants	2.8	20.0
Nearby parking facility	2.6	11.1
Frequently placed schedule monitors	2.6	12.2
News stands	0.6	2.6
Other	0.9	2.0

BEST LIKED AIRPORT OVERALL

Similar to previous years' findings, Amsterdam is the most popular overall, although in current results, it is somewhat less popular than in 1981 and 1979. This year, Singapore is the second most common choice for best liked airport. This airport has gained substantially in popularity over the last five years; in 1979 only 1.8% of the survey respondents indicated that it was the best liked, versus 14.5% in current findings.

AIRPORTS LIKED BEST OVERALL
(Top ten)

	1984	1981	1979
Amsterdam	20.6%	25.9%	24.8%
Singapore	14.5	8.4	1.8
Zurich	9.5	9.8	6.8
Frankfurt	7.8	11.7	10.6
London (Heathrow)	7.8	5.6	10.6
Paris (de Gaulle)	5.6	7.9	6.3
London (Gatwick)	3.9	--	--
Geneva	3.0	1.9	2.1
Miami	2.7	--	--
New York (Kennedy)	2.0	2.2	2.6

However as with airlines, members ratings of airports is greatly influenced by experience (see page 57).

By country of residence, the best liked airports (named by at least 10%) of the respondents) are as follows:

BEST LIKED AIRPORTS

United Kingdom	France	Germany	Middle East	Asia
Amsterdam (25.7%)	Paris (35.6%)	Frankfurt (27.0%)	Amsterdam (19.0%)	Singapore (50.5%)
London (Heathrow) (17.0%)	Amsterdam (11.4%)	Zurich (14.9%)	London (Heathrow) (13.9%)	
Singapore (11.6%)	Singapore (11.0%)	Amsterdam (12.0%)	Singapore (12.8%)	
London (Gatwick) (10.5%)			Zurich (10.3%)	

LEAST LIKED AIRPORT OVERALL

****

As in past years, London's Heathrow airport is the least liked by international survey participants, although this is true of substantially fewer respondents this year (17.0%) than five years ago (30.7%). New York's Kennedy Airport ranks number two as least liked, and has received an increasing number of "least liked" ratings since 1979.

TEN AIRPORTS LIKED LEAST

	1984	1981	1979
London (Heathrow)	17.0%	20.1%	30.7%
New York (Kennedy)	8.7	5.2	3.0
Cairo	4.8	2.7	2.0
Los Angeles	4.2	3.8	1.8
Rome	3.9	2.0	2.3
Bombay	3.8	2.4	2.8
Milan (Linate)	3.6	2.0	--
Bangkok	2.3	--	--
Athens	2.9	--	--
Paris (de Gaulle)	2.6		

By country, the least liked airports (named by at least 5% of the respondents) are presented below;

LEAST LIKED AIRPORTS

United Kingdom	France	Germany	Middle East	Asia
London (Heathrow) (22.5%)	London (Heathrow) (23.8%)	London (Heathrow) (24.3%)	London (Heathrow) (13.4%)	Bangkok (14.2%)
New York (JFK) (7.5%)	New York (JFK) (9.5%)	New York (JFK) (13.3%)	Cairo (10.6%)	Los Angeles (11.2%)
Cairo (5.5%)	Cairo (5.6%)	Frankfurt (8.3%)	New York (JFK) (8.0%)	London (Heathrow) (9.4%)
	Paris (Orly) (5.2%)	Milan (Linate) (5.0%)	Athens (6.7%)	Bombay (8.5%)
				Tokyo (5.3%)

Ratings of airports flown into during past two years

A ranking of airports like most and least when analysed by airport usage and experience indicates a somewhat different order of ranking than previously indicated.

As table 20 shows, Singapore at +43.9% has the highest rating with Amsterdam and Zurich in second and third places. Airports with the lowest ratings are Lagos -37.7%, Cairo -27.6% and Bombay -22.7%.

Of the major international airports New York/Kennedy -11.9%, Rome -11.1% and London Heathrow (-11.3%) emerge with the lowest ratings.

Table 20

Respondents ratings of airports flown into during the past two years

Airport	% Members	% Based on those airports used		
	Flown Into	Liked Most (1 only)	Liked Least (1 only)	Difference
Singapore	31.0	44.3	0.4	+43.9
Amsterdam	53.0	36.3	0.4	+35.9
Zurich	42.5	20.7	0.6	+20.1
Frankfurt	51.6	14.4	2.8	+11.6
Geneva	38.1	7.7	0.9	+ 6.8
London (Gatwick)	46.4	8.1	2.7	+ 5.4
Dallas (Fort Worth)	15.2	6.3	0.9	+ 5.4
Paris (de Gaulle)	52.2	9.9	4.5	+ 5.4
Seattle (Tacoma)	7.5	5.2	0.2	+ 5.0
Stockholm	18.3	5.9	1.4	+ 4.5
Rio de Janeiro	10.1	6.0	1.8	+ 4.2
Miami	28.4	9.5	6.2	+ 3.3
Panama	6.2	6.6	3.4	+ 3.2
San Fransisco	24.9	3.5	1.1	+ 2.4
Houston (International)	14.8	3.3	1.2	+ 2.1
Berlin (Tegel)	9.5	2.7	0.8	+ 1.9
Tokyo	20.9	4.8	3.3	+ 1.5
Washgington DC	14.8	2.7	1.2	+ 1.5
Honolulu	13.5	2.3	1.0	+ 1.3
Minneapolis/St. Paul	6.2	1.4	0.2	+ 1.2
Toronto	12.1	3.1	2.2	+ 0.9
Boston	16.4	2.0	1.7	+ 0.3
Vancouver	6.0	1.6	1.3	+ 0.3
Newark	9.8	2.2	2.0	+ 0.2
Philadelphia	5.9	2.3	2.2	+ 0.1
Copenhagen	28.2	4.7	5.0	- 0.3
Sydney	12.2	1.8	2.2	- 0.4
Montreal	10.9	1.7	2.1	- 0.4
Las Vegas	10.2	0.2	0.6	- 0.4
Rotterdam	7.9	0.9	1.4	- 0.5
Detroit	5.7	0.4	0.9	- 0.5
Anchorage	8.1	0.3	0.9	- 0.6
Pittsburgh	3.5	-	0.7	- 0.7
Osaka	7.8	0.8	1.6	- 0.8

Airport	% Members	% Based on those airports used		
	Flown Into	Liked Most (1 only)	Liked Least (1 only)	Difference
Johannesburg	9.2	3.8	5.0	- 1.2
Glasgow	9.2	2.0	3.3	- 1.3
Abu Dhabi	18.6	1.4	2.7	- 1.3
New Orleans	8.3	0.9	2.3	- 1.4
Tel Aviv	6.4	2.8	4.5	- 1.7
Paris (Orly)	33.4	1.2	3.0	- 1.8
Hong Kong	31.0	3.1	5.3	- 2.2
Brussels	27.5	2.1	4.4	- 2.3
Dublin	9.4	0.7	3.0	- 2.3
Chicago(O'Hare)	22.8	2.3	5.1	- 2.8
New York (La Guardia)	28.8	0.4	3.2	- 2.8
Seoul	8.1	0.4	4.3	- 3.9
Perth	4.6	0.5	4.9	- 4.4
Madrid	22.1	1.0	6.0	- 5.0
Mexico City	8.4	0.3	7.1	- 6.8
Oslo	13.5	0.6	8.3	- 7.7
Lisbon	12.1	0.2	8.9	- 8.7
Athens	26.6	0.5	10.3	- 9.8
Santiago	4.3	0.3	10.6	-10.3
Bangkok	27.5	0.6	11.4	-10.8
Los Angeles	31.6	0.9	12.0	-11.1
London (Heathrow)	77.8	9.5	20.8	-11.3
Rome	27.8	0.8	12.5	-11.7
New York (Kennedy)	52.5	3.5	15.4	-11.9
Milan (Linate)	20.4	0.2	16.5	-16.3
Bogota	7.0	0.5	17.3	-22.7
Bombay	15.3	0.2	22.9	-22.7
Cairo	15.7	0.2	27.8	-27.6
Lagos	6.1	-	37.7	-37.7

ATTITUDES TOWARD VIP CLUB LOUNGES

Overall, slightly over half (57.4%) of the respondents indicate that the availability of an airport VIP lounge is important to them. A VIP lounge is more important to first and business class passengers (especially the former) than to those flying on an economy or discount basis.

IMPORTANCE OF AVAILABILITY OF AIRPORT VIP CLUB LOUNGE TO 1984 INTERNATIONAL SURVEY RESPONDENTS

	Total	First	Business	Economy	Discount
Very important	20.0%	39.1%	22.3%	13.1%	10.2%
Somewhat important	37.4	40.4	42.9	31.8	31.1
Not very important	31.1	17.1	26.9	38.9	37.9
Not at all important	11.5	3.4	7.9	16.1	20.9

Two-thirds of the survey participants express positive interest in the possibility of purchasing a multiple carrier VIP club access card.. Again, first and business class travellers express greater levels of interest in this notion than do economy discount flyers.

1984 INTERNATIONAL RESPONDENTS' LEVELS OF INTEREST IN PURCHASING A MULTIPLE CARRIER VIP ACCESS CARD

	Total	First	Business	Economy	Discount
Very interested	28.1%	42.7%	32.1%	20.9%	19.0%
Somewhat interested	39.3	36.1	41.6	37.9	37.6
Not very interested	22.9	15.5	19.8	27.8	27.6
Not at all interested	9.7	5.7	6.6	13.3	15.8

PURCHASING DUTY-FREE GOODS

****

Three-quarters of this year's international survey participants report that they purchase duty-free goods very often (53.8%) or somewhat often (22.5%) on international flights.

HOW OFTEN 1984 INTERNATIONAL SURVEY RESPONDENTS PURCHASE DUTY-FREE GOODS ON INTERNATIONAL FLIGHTS

Very often	53.8%
Somewhat often	22.5
Not very often	21.5
Not at all	2.2

As it stands now, the vast majority of those who purchase duty-free goods do so when departing for their home city (86.9%) rather than upon arrival in the home city (13.1%).

Over half of the respondents would like to make their duty-free purchases upon arrival at home instead of at the departure airport, and only one in ten would object to doing so.

1984 INTERNATIONAL SURVEY RESPONDENTS' ATTITUDES TOWARD PURCHASING DUTY-FREE GOODS AT HOME AIRPORT AFTER ARRIVAL

Like strongly	49.9%
Like somewhat	9.6
Don't care	29.3
Object somewhat	5.5
Object strongly	5.7

No noteworthy demographic differences emerge from the above findings.

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HOTEL FACILITIES

****

HOTEL/MOTEL USAGE DURING THE PAST TWO YEARS

Over the past two years, the typical 1984 international survey respondent has stayed in a hotel or motel 91.3 nights for business and 28.7 nights for pleasure. French respondents are especially heavy business travellers, while individuals from the Middle East tend to travel more for pleasure than average. Residents of Germany indicate slightly higher than average levels of both business and pleasure travel.

In addition, males and all passengers flying in first or business class more frequently stay in hotels for business than do females and individuals flying economy or discount.

MEAN NUMBER OF NIGHTS STAYED IN A HOTEL/MOTEL
DURING THE PAST TWO YEARS FOR:

	Business	Pleasure
Country of Residence:		
United Kingdom	97.5	28.0
France	112.7	26.7
Germany	103.7	33.6
Middle East	63.6	40.4
Asia	96.3	24.9
Class Flown:		
First	94.0	32.9
Business	109.7	26.6
Economy	75.1	27.3
Discount	70.2	32.1
Sex:		
Male	92.0	28.5
Female	60.4	35.2
Total	91.3	28.7

With regard to the actual hotels patronised during the last two years, the most popular chains have been Holiday Inns, Hilton, Inter-Continental and Sheraton, as about two-thirds of the respondents have stayed in each. The total percentage of respondents having stayed in each hotel chain during the past few years is presented in table 21.

HOTEL CHAINS STAYED IN DURING THE PAST TWO YEARS BY 1984 INTERNATIONAL SURVEY RESPONDENTS

Holiday Inns	68.3%
Hilton	67.8
Inter-Continental	61.1
Sheraton	60.8
Hyatt/Hyatt Regency	47.8
Trusthouse Forte	44.2
Marriott	34.7
Ramada Inns	29.9
Crest Hotels	28.4
Meridien Hotels	27.5
Best Western	27.0
Novotel	26.8
Westin	24.7
Penta Hotels	20.0
Mandarin Hotels	17.0
Steigenberger Hotels	16.4
SAS Hotels	16.4
Sofitel Hotels	16.0
Oberoi Hotels	13.4
Forum Hotels	8.9
Ciga Hotels	8.4
Thistle Hotels	8.3
Concorde Hotels	7.5
TAJ Hotels International	6.9
Jolly Hotels	6.8
Ladbroke Hotels	6.6
Canadian Pacific	6.1
Frantel	5.8
PLM/ETAP	4.6
Rank Hotels	3.8
Stouffer	2.8
Horsa	1.7
Others	13.2

In addition, the most prominent geographic/demographic group differences are as follows;

Residents of the United Kingdom have frequented the following chains more than average:

- Trusthouse Forte (69.2%)
- Crest Hotels (47.8%)
- Thistle Hotels (22.4%)
- Ladbroke Hotels (19.2%)

French respondents indicate above average levels of patronage of these hotels:

- Meridien (50.2%)
- Novotel (58.1%)
- Sofitel (40.0%)
- Concorde Hotels (23.4%)
- Frantel (29.8%)
- PLM/ETAP Hotels (18.9%)

Among German respondents, the following hotel chains have been more popular than average:

- Inter-Continental (74.0%)
- Ramada Inns (40.0%)
- Crest Hotels (46.3%)
- Novotel (49.3%)
- Penta Hotels (37.3%)
- Steigenberger Hotels (57.9%)
- Canadian Pacific (18.2%)

Middle Eastern travellers have spent less time than average at

- Crest Hotels (15.5%)
- Novotel (15.7%)

Among Asian respondents, the Hyatt (59.7%), Westin (42.4%) and Mandarin Hotels (42.4%) have been above average popularity, while the following chains have been patronised less often than average:

- Trusthouse Forte (20.2%)
- Marriott (22.4%)
- Crest Hotels (12.6%)
- Best Western (16.5%)
- Novotel (10.6%)
- Penta Hotels (9.6%)

First Class flyers patronise the following hotel chains more than average;

- Hilton (80.2%)
- Inter-Continental (75.9%)
- Sheraton (71.8%)
- Westin (36.0%)
- Mandarin Hotels (27.3%)

At the same time discount travellers have stayed at the following hotels less often than average:

- Hilton (51.2%)
- Inter-Continental (42.9%)
- Sheraton (46.3%)
- Hyatt/Hyatt Regency (37.1%)

Finally, the following hotels chains appear to have had a particularly strong position in the "heavy business traveller" (at least 25 trips during the past 2 years) market:

- Hilton (79.8%)
- Inter-Continental Hotels (73.2%)
- Sheraton (71.7%)
- Hyatt/Hyatt Regency (57.7%)
- Marriott (44.5%)
- Novotel (37.5%)

HOTEL PRICES

1984 International respondents report spending an average of $84.50 per night for business accommodations and $70.70 for pleasure accommodations. Middle Eastern respondents spend far more than others for their hotel accomodations, while residents of Germany have lower than average hotel expenditures. In addition, hotel expenditures show a strong positive correlation to the airline class flown.

AVERAGE HOTEL ROOM EXPENDITURES PER NIGHT FOR:

Country of residence:	Business	Pleasure
United Kingdom	$80.90	$62.40
France	84.30	64.80
Germany	73.50	58.10
Middle East	98.00	85.60
Asia	89.40	76.30
Class Flown:		
First	$117.30	$108.10
Business	86.20	89.00
Economy	74.40	63.10
Discount	71.80	58.40
Total	84.50	70.70

PERCEIVED EXPENSE OF HOTEL COSTS

Very Expensive	30.8%
Somewhat Expensive	49.2
About What You'd Expect	19.3
Somewhat Inexpensive	0.6
Very Inexpensive	0.1

SELECTION OF HOTEL ACCOMMODATION

Regardless of demographic/geographic group, 1984 international survey respondents generally choose their hotel accommodation themselves.

WHO SPECIFIES THE HOTEL/MOTEL USED FOR:

	Business Trips	Pleasure Trips
Self	82.2%	94.0%
Travel agent	3.4	4.8
Company travel department	4.0	0.2
Dictated by company policy	3.4	0.0
Business associate at destination	3.8	0.2

Except where noted, respondents agree upon the relative importance of several factors in the choice of a hotel or motel as follows:

THE THREE MOST IMPORTANT FACTORS CONSIDERED IN CHOOSING A HOTEL

Location		89.5%
Past Experience		71.5
IAPA Discount	(1)	33.1
Low Price	(2)	23.4
Special Services/Amenities	(3)	22.3
Airport Shuttle Availability		15.2
Corporate Rate		14.6
Executive Floor/Suites Available	(4)	5.2
Choice of Smoking/Non-Smoking Accommodations		4.1
Frequent Flyer Programme Tie-in		2.6
Meeting/Convention Facilities		2.4
Other		8.0

(1) Class Flown

First	Business	Economy	Discount
22.3%	29.5%	38.6%	38.4%

(2) Class Flown

First	Business	Economy	Discount
10.1%	15.3%	29.6%	42.6%

(3) 31.6% For First Class Travellers

(4) 15.2% For First Class Travellers

TYPE OF HOTEL ACCOMMODATION USED
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Overall, when travelling for business about half of the current International respondents most frequently stay in "four star/superior" hotel accommodation and an additional one-third choose "top of the line," (i.e., "five star/deluxe") lodging. Middle East residents and first class passengers lean relatively heavily toward five star accommodation for business travel.

For pleasure travel, most respondents choose either four star/superior or three star/standard lodging. Again, Middle Eastern respondents and individuals flying first class are more apt than others to lean toward deluxe accommodation.

TYPE OF LODGING USED MOST OFTEN

	Five Star Deluxe	Four Star Superior	Three Star Standard	Two Star Economy
For Business:				
Country of Residence:				
United Kingdom	24.6%	55.4%	17.8%	2.3%
France	29.7	46.3	21.1	2.8
Germany	21.8	58.7	18.3	1.3
Middle East	54.7	33.4	10.3	1.5
Asia	36.0	42.2	17.3	4.5
Class Flown:				
First	65.1	30.0	4.7	0.2
Business	33.9	53.8	11.4	0.9
Economy	20.6	48.7	27.2	3.5
Discount	19.1	47.0	28.2	5.6
Total	32.0	48.0	17.7	2.3
For Pleasure:				
Country of Residence:				
United Kingdom	14.3%	35.9%	40.2%	2.7%
France	16.9	34.2	36.3	12.7
Germany	14.3	40.8	36.6	8.4
Middle East	31.8	42.0	22.0	4.2
Asia	21.9	38.7	29.8	9.6
Class Flown:				
First	44.7	39.4	13.2	2.7
Business	18.1	39.8	35.4	6.7
Economy	13.2	36.9	39.1	10.9
Discount	12.1	34.2	38.3	15.4
Total	19.4	38.0	34.0	8.6

OVERALL EVALUATIONS OF HOTEL CHAINS
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Favourite Hotel Chain
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With generally consistent results in the demographic/geographic sub-groups, respondents name the following hotel chains as their favourites;

TOP TEN FAVOURITE HOTEL CHAINS

Inter-Continental	16.7%
Hyatt/Hyatt Regency	12.8
Hilton	12.2
Sheraton	10.5
Holiday Inns	10.4
Marriott	4.9
Mandarin Hotels	4.6
Trusthouse Forte	4.6
Westin Hotels	4.0
Steigenberger Hotels	2.1
Others	17.2

Hotel Chain with the Best Service

Similar to the findings for the favourite hotel, respondents agree that the following chains provide the best service.

HOTEL CHAIN WITH THE BEST SERVICE

Inter-Continental	16.6%
Hyatt/Hyatt Regency	13.9
Hilton	11.7
Sheraton	10.3
Mandarin Hotels	6.9
Holiday Inns	6.8
Marriott	5.1
Westin Hotels	4.3
Trusthouse Forte	3.7
Steigenberger	2.6
Others	18.1

Hotel Chain with the Poorest Service

The hotel chain most frequently singled out as having the poorest service is Holiday Inns. With similar findings in the subgroups, the following chains are generally chosen as offering the worst service.

HOTEL CHAIN WITH THE POOREST SERVICE

Holiday Inns	18.0%
Trusthouse Forte	9.4
Novotel*	9.0
Hilton	7.8
Sheraton	6.4
Ramada Inns	5.9
Crest Hotels	5.3
Penta Hotels	4.3
Best Western	4.1
Meridien Hotels	3.8
Inter-Continental	3.6
Sofitel	2.8
Hyatt/Hyatt Regency	2.1
Other	17.5

* 18.2% in France, 21.0% in Germany

Hotel Chains With the Best Facilities

In keeping with evaluations for the favourite chain and chain with the best service, respondents feel that these hotel chains generally provide the best facilities.

HOTEL CHAINS WITH THE BEST FACILITIES

Inter-Continental	17.6%
Hyatt/Hyatt Regency	15.1
Hilton	14.0
Sheraton	12.2
Holiday Inns	7.9
Mandarin Hotels	5.3
Marriott	5.0
Westin Hotels	4.2
Trusthouse Forte	3.1
Meridien Hotels	2.2
Other	13.4

Hotel Chains With the Poorest Facilities

As with service, Holiday Inns is the hotel chain to receive the most mentions as having the poorest facilities. However, significant numbers of French and German respondents feel that the Novotel hotels offer the poorest facilities.

HOTEL CHAINS WITH THE POOREST FACILITIES

Holiday Inns	16.2%
Novotel*	10.5
Trusthouse Forte	10.5
Ramada Inns	7.6
Crest Hotels	6.7
Best Western	5.5
Hilton	4.6
Sheraton	4.4
Penta Hotels	4.0
Sofitel	3.0
Meridien Hotels	2.9
Inter-Continental	2.6
Other	21.5

*24.7% in France, 22.0% in Germany

HOTEL ROOMS FOR SMOKERS AND NON-SMOKERS
****

With consistent findings in all demographic/geographic groups, about half of the International respondents favour the idea of hotels providing rooms for smokers and non-smokers. Most others are indifferent to this concept, and relatively few actually object to it.

FEELINGS ABOUT HOTELS THAT PROVIDE ROOMS FOR SMOKERS AND NON-SMOKERS

Strongly in favour	36.3%
Somewhat in favour	14.9
Makes no difference	41.9
Somewhat opposed	2.3
Strongly opposed	4.6

****

CAR RENTAL COMPANIES

****

RENTAL CAR USAGE DURING THE PAST 2 YEARS

The typical 1984 international survey respondent has rented a car 11.5 times for business and 3.8 times for pleasure within the last two years. The noteworthy geographic and demographic differences in these figures generally relate to car rentals for business purposes, as indicated below.

RENTED A CAR DURING THE PAST TWO YEARS

		Country of Residence				
	Total	United Kingdom	France	Germany	Middle East	Asia
Business	11.5	10.3	17.9	15.8	9.0	6.6
Pleasure	3.8	3.0	4.4	3.8	5.1	3.2

		Class Flown				Sex	
	Total	First	Business	Economy	Discount	Male	Female
Business	11.5	12.2	13.1	10.3	8.3	11.6	5.9
Pleasure	3.8	4.6	3.5	3.6	3.9	3.8	3.3

Car rental usage has definitely increased since 1981 with reported use of major agencies up about 10 percent. Avis and Hertz still dominate the market. In addition, almost half of the 1984 respondents report having rented a car from Budget during the past two years.

RENTAL CAR AGENCIES USED DURING THE PAST TWO YEARS

	1984	1981
Avis	79.6%	71.1%
Hertz	69.8	60.4
Budget	46.7	35.0
Europcar	34.8	23.2
National	25.2	16.3
Inter Rent	14.6	11.4
Dollar	10.4	8.6
Thrifty	4.2	3.7
Tilden	2.6	--
Autohansa	1.8	2.0
American International	1.3	1.4

As a rule, the major car rental agencies show fairly equal popularity among residents of each country under consideration in this study. However, Europcar shows heightened usage among French respondents, and both Inter Rent and Autohansa have been more popular than average among German citizens.

RENTAL CAR AGENCIES USED BY 1984 INTERNATIONAL SURVEY
RESPONDENTS DURING THE PAST TWO YEARS

	Total	United Kingdom	France	Germany	Middle East	Asia
Avis	79.6%	79.7%	84.6%	81.4%	77.2%	78.8%
Hertz	69.8	66.3	76.1	75.2	61.5	70.4
Budget	46.7	48.1	46.2	36.2	50.4	45.7
Europcar	34.8	40.5	(61.5)	32.2	37.1	20.4
National	25.2	19.8	21.1	18.2	22.7	33.1
Inter Rent	14.6	10.7	14.2	(45.9)	13.0	4.3
Dollar	10.4	9.9	6.5	11.4	8.0	9.4
Thrifty	4.2	3.9	4.0	4.9	3.4	6.2
Tilden	2.6	2.5	3.2	2.9	2.2	1.9
Autohansa	1.8	1.5	0.8	(11.1)	1.3	0.8
American Int'l	1.3	0.8	1.2	2.0	1.2	1.9

( ) = Far above average percent of usage.

SELECTION OF CAR RENTAL COMPANY
****

Regardless of geographic/demographic group, respondents generally choose their car rental company themselves when travelling for business and pleasure.

WHO SPECIFIES THE CAR RENTAL COMPANY USED FOR:

	Business	Pleasure
Self	83.7%	95.1%
Dictated by company policy	4.4	0.3
Secretary	3.6	1.2
Travel Agent	3.4	3.0
Company travel department	3.1	0.2
Business associate at destination	1.7	0.2

Overall, by far the most important factor in selection of a car rental agency is whether it has an airport location. However, for economy and discount travellers, low price is of equal importance to the on-airport location. The relative importance of all factors evaluated by respondents is as follows:

THE THREE MOST IMPORTANT FACTORS IN 1984 INTERNATIONAL SURVEY RESPONDENTS' CHOICE OF A CAR RENTAL COMPANY

On-Airport Location (1)	65.8%
Low Price (2)	44.2
Condition of cars	39.9
IAPA discount	38.4
Fast pick-up and delivery service	29.4
Types of cars available	21.8
Express check-in/check-out	20.5
Guaranteed reservations	12.9
Courteous service	11.5
Corporate rate availability	9.0
Off-airport location	2.9
Frequent renter programmes	1.2
Other	1.6

(1) Class Flown

First	Business	Economy	Discount
69.4	71.8	62.9	55.1

(2) Class Flown

First	Business	Economy	Discount
30.1	34.6	51.9	64.3

EVALUATIONS OF CAR RENTAL AGENCIES

Best Overall Service

As in prior years' International survey findings, 1984 respondents think that Avis provides the best overall service of any car rental agency. Hertz has improved its position since previous surveys.

	Agency With the Best Service Overall	Most Preferred Agency	
	1984	1981	1979
Avis	42.4%	43.7%	51.3%
Hertz	31.3	27.2	23.1
Budget	7.9	10.0	11.0
Europcar	7.5	5.5	--
National	5.0	3.6	3.3
Inter Rent	1.9	1.9	--
Dollar	0.6	1.3	0.5
American International	0.6	--	--
Tilden	0.3	--	--
Autohansa	0.3	--	--
Thrifty	0.2	--	--
Other	2.1	6.8	10.8

Among residents of Asia, Germany and France, especially the latter, Hertz rivals Avis for its reputation as the rental car agency providing the best service.

AGENCY WITH THE BEST OVERALL SERVICE, 1984 INTERNATIONAL SURVEY RESPONDENTS

	Total	United Kingdom	France	Germany	Middle East	Asia
Avis	42.4%	47.2%	34.4%	40.4%	41.7%	38.5%
Hertz	31.3	25.8	38.2	34.5	26.3	33.1
Budget	7.9	7.9	4.3	5.5	9.2	10.9
Europcar	7.5	11.3	17.2	5.1	8.4	3.6
National	5.0	2.7	3.2	1.7	5.8	7.3
Inter Rent	1.9	1.4	--	9.8	1.5	1.1
Dollar	0.6	0.7	1.1	--	--	--
American Int'l	0.6	0.1	1.1	0.9	1.0	0.7
Tilden	0.3	0.2	--	0.9	0.6	--
Autohansa	0.3	0.1	--	--	0.8	--
Thrifty	0.2	0.3	--	--	0.5	0.7
Other	2.1	2.4	0.5	1.3	4.2	4.0

Poorest Overall Service

Hertz and Budget are the agencies most frequently cited as providing the poorest service overall, and Avis is in a close third place. Hertz appears to have improved greatly relative to its 1981 position as the overwhelming first choice of agency to be avoided, and Budget has worsened somewhat in this respect.

	Agency With The Poorest Service Overall	Agency Prefer Not To Use
	1984	1981
Hertz	19.1%	41.8%
Budget	19.0	10.5
Avis	16.0	19.4
Europcar	12.5	6.4
National	9.8	4.6
Inter Rent	6.8	3.4
Dollar	6.4	3.8
Thrifty	3.4	1.6
Autohansa	1.3	--
Tilden	1.0	--
American International	0.9	--
Other	3.8	8.4

No noteworthy demographic or geographic subgroup differences emerge regarding the car rental agency with the poorest overall service.

Prices

Two-thirds (63.1%) of the 1984 International survey participants identify Hertz as the car rental agency with the highest prices, and an additional quarter (25.1%) think that Avis has the highest prices. These results are consistent across demographic subgroups, and only slight geographic differences arise, as shown below.

CAR RENTAL COMPANY WITH THE HIGHEST PRICES

	Total	United Kingdom	France	Germany	Middle East	Asia
Hertz	63.1%	65.3%	71.1%	61.5%	55.9%	59.9%
Avis	25.1	24.1	17.1	24.9	31.3	30.7
Europcar	4.1	4.1	3.5	1.8	5.7	2.5
Other	7.7	6.5	8.3	11.8	7.1	6.9

One-third (35.3%) of the current respondents think of Budget as the car rental company with the lowest prices, while others are divided on this issue. Again, demographic subgroups give consistent responses to this question, while some geographic differences do occur.

CAR RENTAL COMPANY WITH THE LOWEST PRICES

	Total	United Kingdom	France	Germany	Middle East	Asia
Budget	35.3%	39.0%	39.7%	35.6%	29.1%	36.3%
Europcar	11.3	14.6	23.0	9.4	14.4	8.3
Avis	10.3	9.3	6.3	11.4	10.4	9.3
National	10.0	8.8	4.8	2.7	10.2	14.0
Dollar	7.8	7.1	6.3	8.7	4.9	7.3
Thrifty	5.2	4.5	4.8	6.0	5.3	6.2
Inter Rent	5.2	3.5	4.0	10.7	7.3	1.6
Hertz	5.1	4.0	3.2	4.0	4.9	6.2
Other	9.8	9.0	7.9	11.4	13.3	10.8

RENTAL CARS FOR SMOKERS AND NON-SMOKERS

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With highly consistent findings in the demographic/geographic subgroups, almost half (47.5%) of the 1984 respondents favour the idea of separate rental cars for smokers and non-smokers. An additional 45.9% are indifferent to this idea, and very few (6.6%) oppose it.

1984 INTERNATIONAL SURVEY RESPONDENTS' FEELINGS ABOUT COMPANIES THAT PROVIDE RENTAL CARS FOR SMOKERS AND NON-SMOKERS

Strongly in favour	33.7%
Somewhat in favour	13.8
Makes no difference	45.9
Somewhat opposed	2.1
Strongly opposed	4.5